

Procserve Commerce Hub User Manual Release 4.7



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1

About this Guide

1 About this Guide

1.1 Introduction

The aim of this guide is to give you a comprehensive guide on how to use the Procserve Commerce Network system effectively.

Who is Procserve?

Procserve is a Commerce Network. It connects buyers and suppliers together via a fully hosted eCommerce infrastructure. Procserve particularly specialises in providing and managing eProcurement and eInvoicing solutions and services for customers.

What does Procserve offer?

- Procserve offers packaged Commerce Solutions to enable our customers of all sizes and technical capabilities to connect to the Commerce Network
- All of our solutions are provided as software-as-a-service, with no requirement for capital investment in IT infrastructure

What do our solutions consist of?

The Procserve solutions are a blend of world-class application Commerce Modules, all hosted and managed by Procserve, combined with professional service packages that ensure a swift implementation and maximum return on investment.

The Procserve Commerce Network

Procserve offers two types of services, **commerce solutions** and **commerce services**. Regardless of what back office infrastructure organisations have, Procserve implements only those trading solutions needed to complete their ability to conduct electronic transactions between buyer and supplier. Procserve also provides services in order to implement these commerce solutions and exploit their capability. The level of services provided are entirely flexible.

2

Procserve Commerce Network

2 Procserve Commerce Network

2.1 Procserve Commerce Hub Getting Started

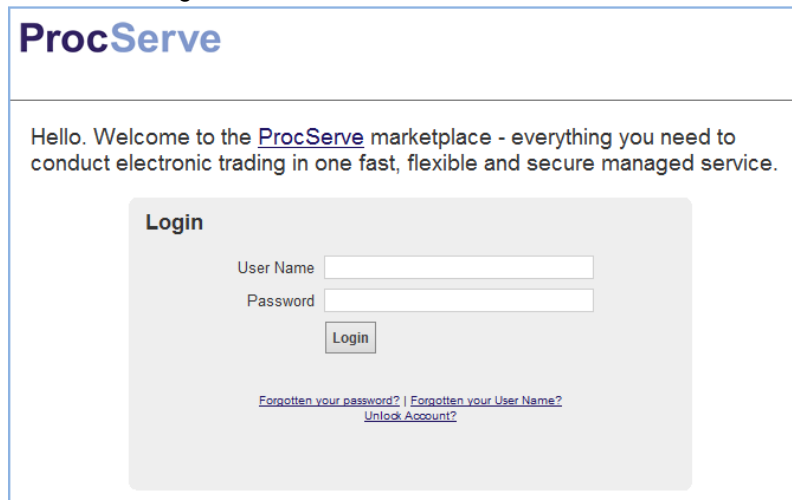
2.1.1 Logging on to Procserve Commerce Hub

1. Navigate to the Procserve Commerce Hub URL:

<https://buyers.procserveonline.com/otis/login.html?marketplace=procserve>

Click the 'Log in' button

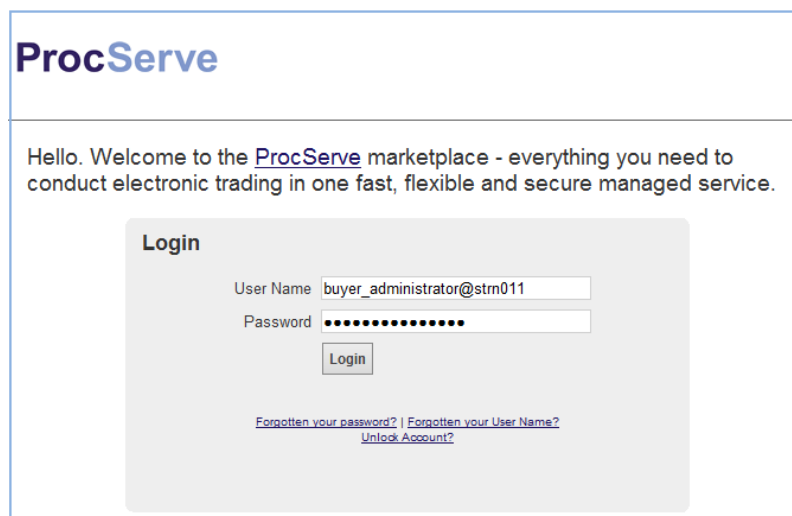
You will be presented with the log in screen:



The image shows the ProcServe login page. At the top is the ProcServe logo. Below it is a welcome message: "Hello. Welcome to the ProcServe marketplace - everything you need to conduct electronic trading in one fast, flexible and secure managed service." In the center is a login box with the title "Login". Inside the box are two input fields: "User Name" and "Password". Below the password field is a "Login" button. At the bottom of the login box are three links: "Forgotten your password?", "Forgotten your User Name?", and "Unlock Account?".

2. Enter your username and password:

Tip! You will have received these via email. It is sometimes easier to copy and paste the system generated password.



This image shows the same ProcServe login page as the previous one, but with the login fields filled. The "User Name" field contains the text "buyer_administrator@strn011". The "Password" field is filled with a series of black dots. The "Login" button and the links at the bottom remain the same.

Tip! If this is the first time you have logged in - you will be asked to reset your password and create a memorable word. The memorable word is used to reset your account should you lock it through multiple incorrect log in attempts:

ProcServe

Please change your password to something that is more meaningful to you. Please remember that your Community requires your password to adhere to the following rules; your password must include **letters, numbers and symbols** and must be at least **eight characters long**. Your password must also be different to the system generated password that you were sent.

Password reset

Current password

New password

Confirm new password

You will see the home page:

Hello Buyer_ You last logged in **today** (26 July) | [My Profile](#) | [Feedback](#) | [Logout](#)

ProcServe

[Main Menu](#) [Administration](#)

[Home](#) [My Transactions](#) [Catalogue Shopping](#) [Raise a Free Text Order](#) [Create a new Request for Quote](#) [Supplier Directory](#)

Home

Welcome

Welcome to OTIS the latest generation of online procurement tools designed to simplify the procurement process and enabling rapid benefits realisation.

OTIS provides immediate and simple access to rich content provided by your suppliers on the ProcServe Trading Network. Its intuitive nature lets you buy what you need easily, while helping you to manage the end-to-end transaction process with your suppliers fully electronically and on-line.

Whether you're looking to buy basic commodities or complex products and services, OTIS helps you manage the procurement process so you can ensure that you get the goods and services you need, when you want and at the price you have agreed.

OTIS enables you to:

- Create requisitions from the catalogues available to you via the ProcServe Trading Network or by using 'free-text' ordering
- Ensure that all requisitions are forwarded for approval by the appropriate budget holders
- Generate purchase orders and other procurement documents and transmit these electronically to suppliers
- Receive electronic invoices and other related procurement transactions from suppliers
- Manage and view all of these documents in a simple inbox/outbox based environment
- Control your spend using the document history and audit trails to provide easy visibility for you and your organisation.

Note: The menus that you are presented with will depend on the roles your user has been given.

2.1.2 Retrieving a Lost Password

Overview

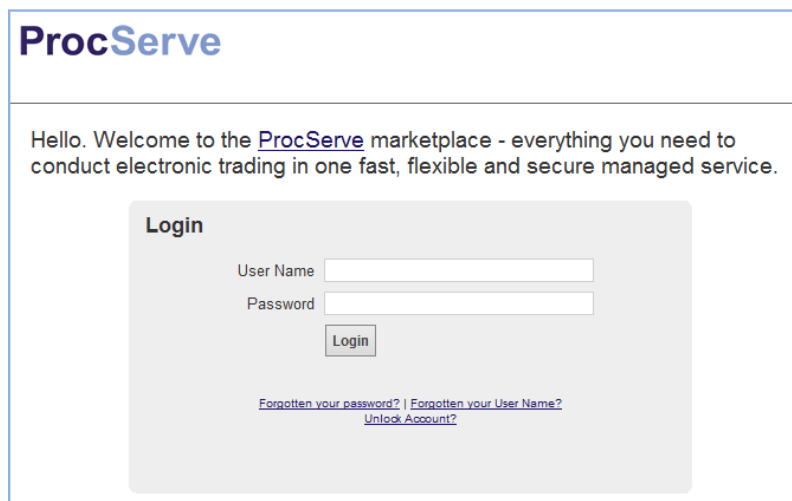
Should you forget your password, you can generate a system password which will be emailed to your registered account.

Retrieving a lost password

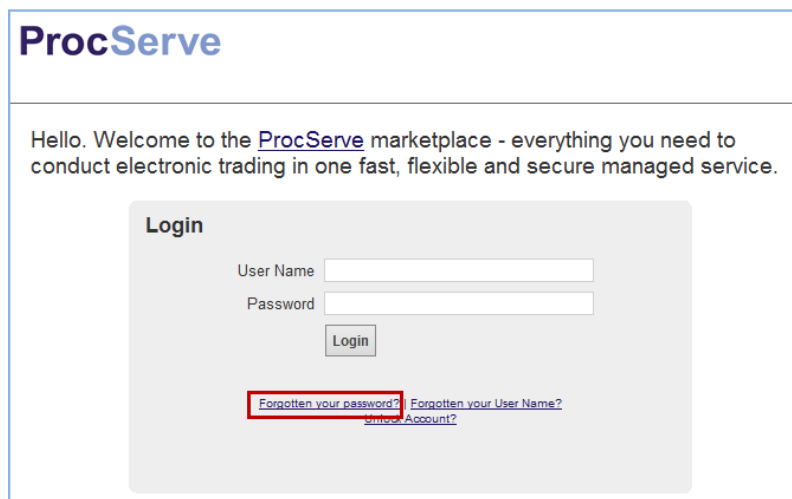
1. Navigate to the Procserve Commerce Hub URL:

<https://buyers.procserveonline.com/otis/login.html?marketplace=procserve>

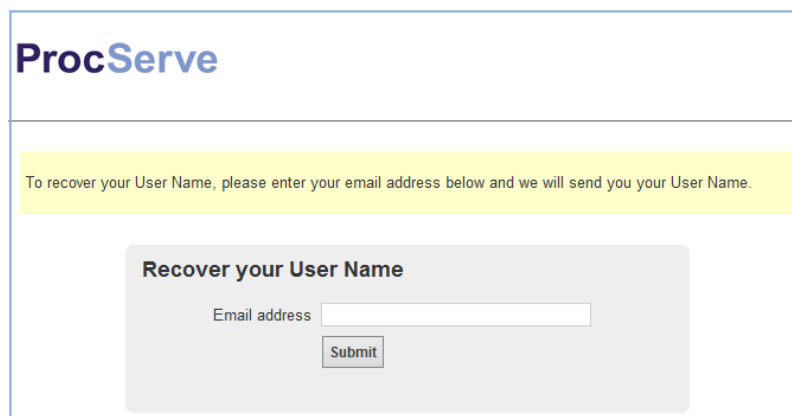
You will be presented with the log in screen:



2. Click on the 'Forgotten your password?' link at the bottom of the page:



3. Enter your username:



The screenshot shows the ProcServe logo at the top. Below it is a yellow banner with the text: "To recover your User Name, please enter your email address below and we will send you your User Name." Underneath the banner is a grey box titled "Recover your User Name". Inside this box, there is a label "Email address" followed by a text input field. Below the input field is a "Submit" button.

4. Click 'Submit'

Note: Your password will be sent to you via email. The next time you log in you will have to change it from the system generated password.

2.1.3 Retrieving a Lost Username

Overview

Should you forget your username, you can request a reminder which will be emailed to your registered account.

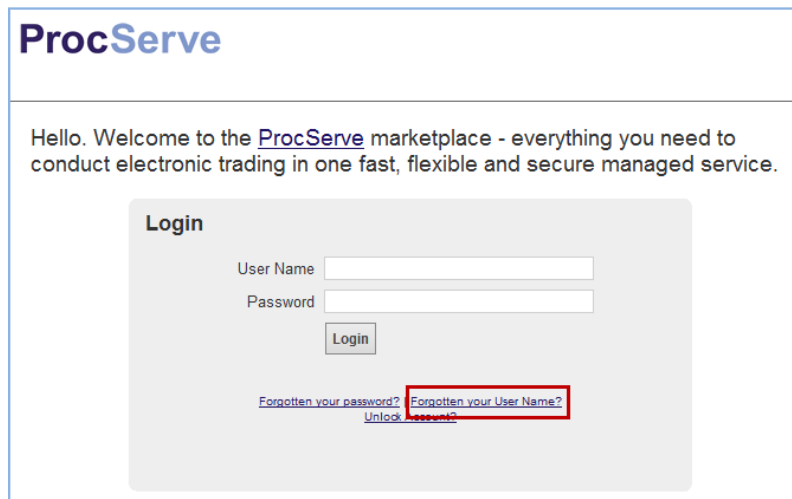
Retrieving a lost username

1. Navigate to the Procserve Commerce Hub URL:

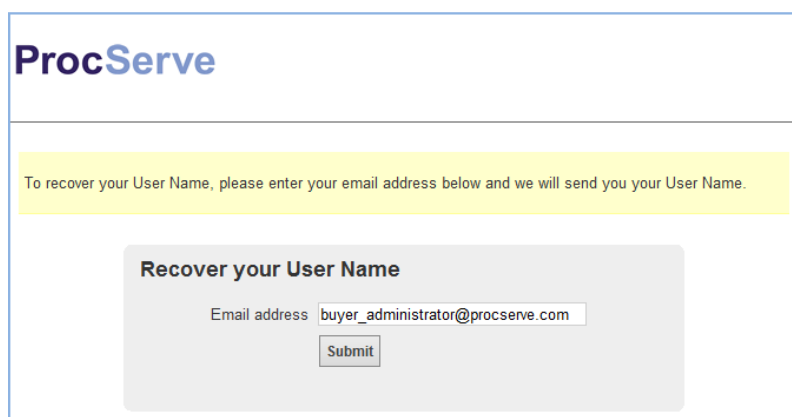
<https://buyers.procserveonline.com/otis/login.html?marketplace=procserve>

You will be presented with the log in screen, at log in screen:

2. Click on the 'Forgotten your username?' link:



3. Enter your email address:



4. Click 'Submit'

Note: Your username will be sent to you via email as an example below:

Hello Buyer_

We received a request for your User Name to be resent to you. Please see below:

Your User Name is: buyer_administrator@strn011

Using this and your Password you can now log in to the eMarketplace at:

https://saturn-buyers.procserveonline.com/otis/login.html?marketplaceId=2&locale=en_GB

The first time you use this password you will be asked to change it to something more memorable for you.

It is recommended that instead of typing the User Name try copying and pasting it into the login screen using the following steps:

1. Highlight the User Name making sure there are no spaces at the beginning or the end
2. Right click and select 'Copy'
3. In the User Name field of the login screen right click again and select 'Paste'

If you did not request a User Name reminder, please contact the Zanzibar Service Desk via zanzibarhelpdesk@procserve.com

2.1.4 Navigating Around Procserve Commerce Hub

Overview

When you first log in to Procserve Commerce Hub you will land on the homepage. Below is a brief description of where you need to navigate to in order to access the various features of Procserve Commerce Hub.

Note: The menu options and features that you have will depend on your organisation and the role that you have been given.

The Homepage

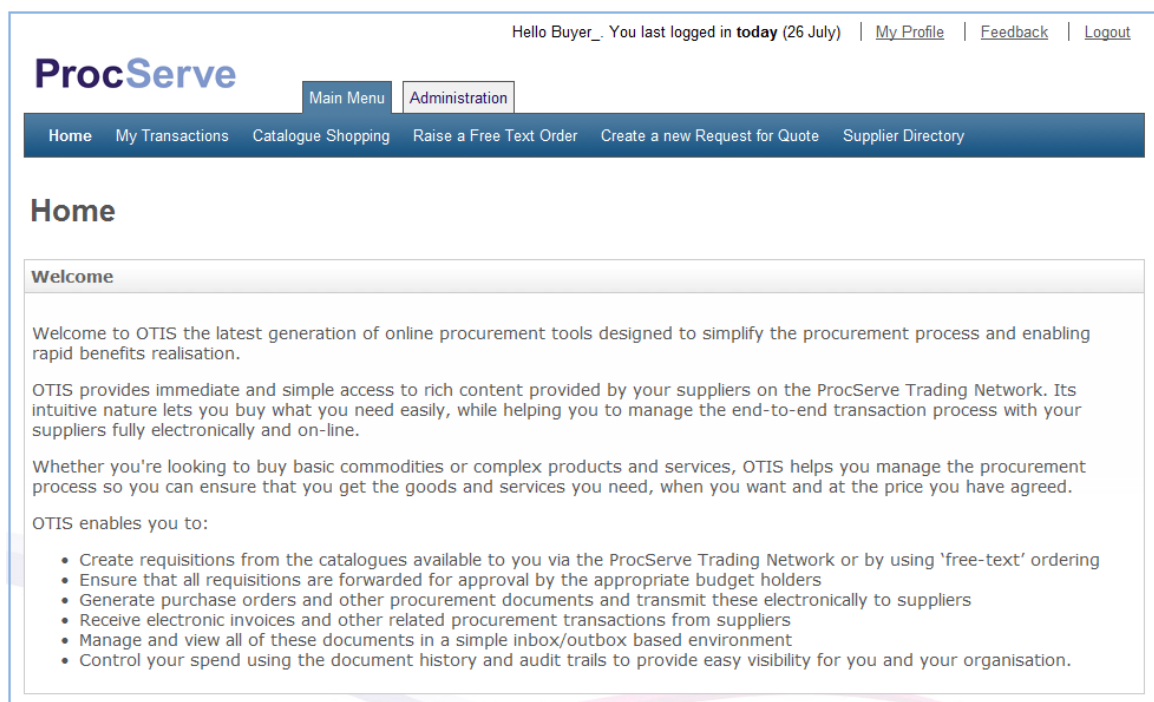
1] Header - from here you can change your profile and password, give feedback on Procserve Commerce Hub and log out of Procserve Commerce Hub.

2] Menu tabs - the two options are 'Main Menu' and 'Administration'. These are described later in this section.

3] Menu options - once selected you can view a variety of other menus which are described later in this section.

4] Menu body - the detail of the area where you can complete your required task.

5] Footer details - Procserve privacy and accessibility details as well as some useful contact information of the Procserve Commerce Hub administrators.



Main Menu Options

Note: Dependant on your organisation set up and roles you have been given, you may not have access to some of the menu options.

1] Home - shows the homepage and any news feeds

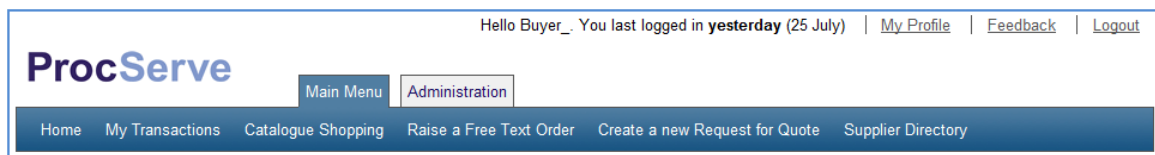
2] My Transactions - My Transactions captures your own and your organisations transactions. From within My Transactions you can perform any approvals that may be required on specific document types. You can also view inbound documents and documents you have created.

3] Catalogue Shopping - You can access the marketplace and shop for catalogue items.

4] Create a new Free Text Order - You can shop for non catalogue items. This tool provides a method to keep all transactions within Procserve Commerce Hub.

5] Create a new Request for Quote (RFQ) - You can create a Request for Quote (RFQ) for any good or service where you require a competitive procurement process to take place.

6] Supplier Directory - Supplier Directory allows you to view all suppliers registered on the Procserve Trading Network who are available in your marketplace.



Administration Menu Options

Note: Dependant on your organisation set up and roles you have been given, you may not have access to some of the menu options.

1] Community Management - Within Community Management you can edit the helpdesk contact details, organisations and catalogue content and views.

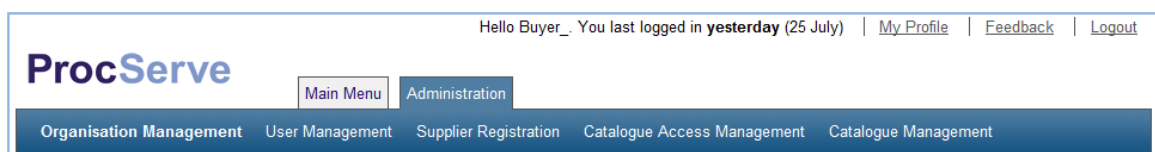
2] Organisation Management - You can view and edit the the general address details of your organisation in 'Organisation Management'.

3] User Management - You can add, edit and deactivate users within your organisation in 'User Management'.

4] Supplier Registration - You can manage your supplier adoption in 'Supplier Registration'.

5] Catalogue Access Management - You can determine which organisations and users can see what content in 'Catalogue Access Management'.

6] Catalogue Management - You can upload and manage your catalogue content in 'Catalogue Management'.



2.1.5 My Profile

Overview

Within the My Profile you can edit your general details and view the roles that you have.

Note: Dependant on the roles you have been given you may not be able to see all functions in the below screenshots.

Viewing My Profile

1. Click on 'My Profile' from any page within Procserve Commerce Hub

You will be taken to the overview page where you can view and edit your basic details.

ProcServe

Hello Buyer_ You last logged in **yesterday** (25 July) | [My Profile](#) | [Feedback](#) | [Logout](#)

Main Menu Administration

Home My Transactions Catalogue Shopping Raise a Free Text Order Create a new Request for Quote Supplier Directory

My Profile

Overview Role(s)

Mr Buyer_ Administrator [Edit My Profile](#)

User Name	buyer_administrator@strm011
Email address	nasir.ahmed55@procserve.org
Organisation	SATURN LTD
Default address	Hoe Street Walthamstow London E17 4SD United Kingdom
Telephone number	13793793793795
Fax number	
Preferred language	English (UK)
Job title	Administrator
Document notifications	Receive email notifications for new documents

You can view any of the tabs and the details within them by clicking on the tab. By clicking on the 'Roles' tab you can view the roles that you have been given.

My Profile

ProcServe

Main Menu

Administration

Home

My Transactions

Catalogue Shopping

Raise a Free Text Order

Create a new Request for Quote

Supplier Directory

Hello Buyer_. You last logged in **yesterday** (25 July) | [My Profile](#) | [Feedback](#) | [Logout](#)

My Profile

Overview

Role(s)

Mr Buyer_ Administrator

Role	Description
Buyer administrator	Buyer Administrator users are have the ability to manage their organisations and users

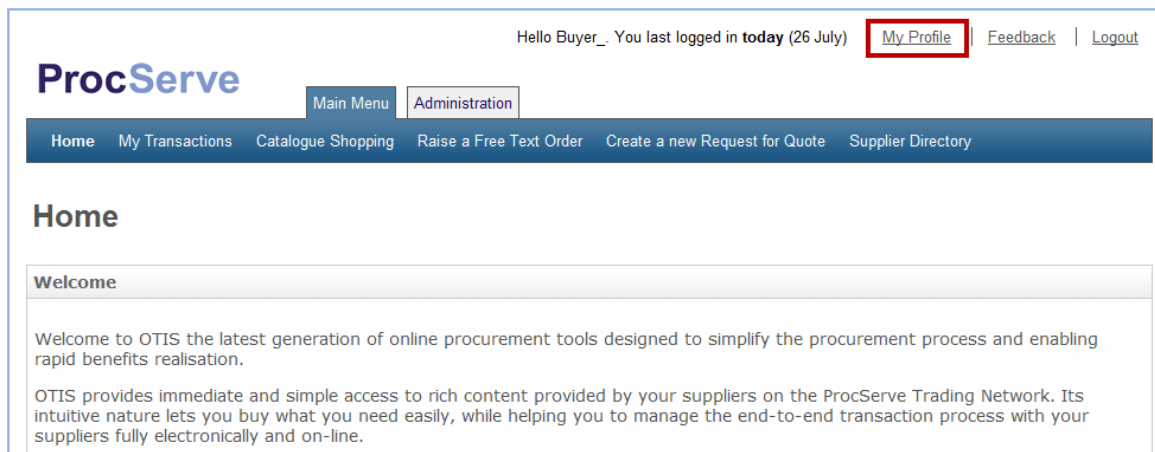
2.1.5.1 Editing My Profile

Overview

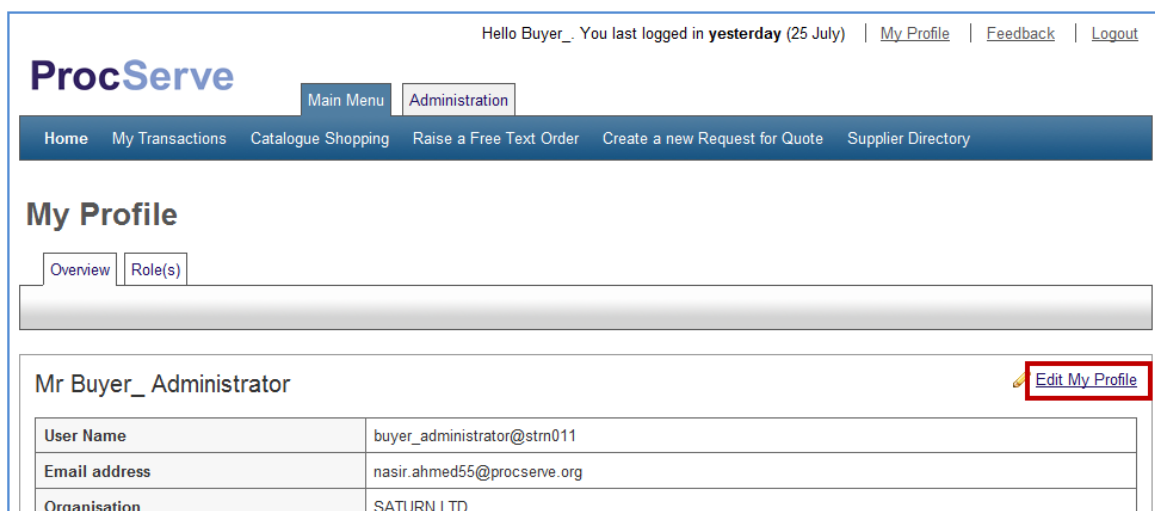
You can update your basic details on your profile.

Editing my profile

1. Click on 'My Profile' from any page within Procserve Commerce Hub



2. Click on 'Edit My Profile'



3. Edit the features you wish to change

Hello Buyer_ You last logged in **today** (26 July) | [My Profile](#) | [Feedback](#) | [Logout](#)

ProcServe [Main Menu](#) [Administration](#)

[Home](#) [My Transactions](#) [Catalogue Shopping](#) [Raise a Free Text Order](#) [Create a new Request for Quote](#) [Supplier Directory](#)

My Profile

[Overview](#) [Role\(s\)](#)

Title *	Mr ▾
First name *	Buyer_
Last name *	Administrator
User Name	buyer_administrator@stm011 - Sorry you can't edit this
Email address *	buyer.administrator@procserve.com

4. Once complete, click 'Save Changes'

My Profile

[Overview](#) [Role\(s\)](#)

Title *	Mr ▾
First name *	Buyer_
Last name *	Administrator
User Name	buyer_administrator@stm011 - Sorry you can't edit this
Email address *	buyer.administrator@procserve.com
Confirm Email address *	buyer.administrator@procserve.com
Organisation	SATURN LTD - Sorry you can't edit this
Default address	Hoe Street Walthamstow - E17 4SD ▾
Telephone number	13793793793795
Fax number	
Preferred language	English (UK) ▾
Job title	Administrator
Document notifications	<input checked="" type="checkbox"/> Receive email notifications for new documents

[Save Changes](#) [Cancel](#)

Note: If you wish to cancel your changes, click 'Cancel'

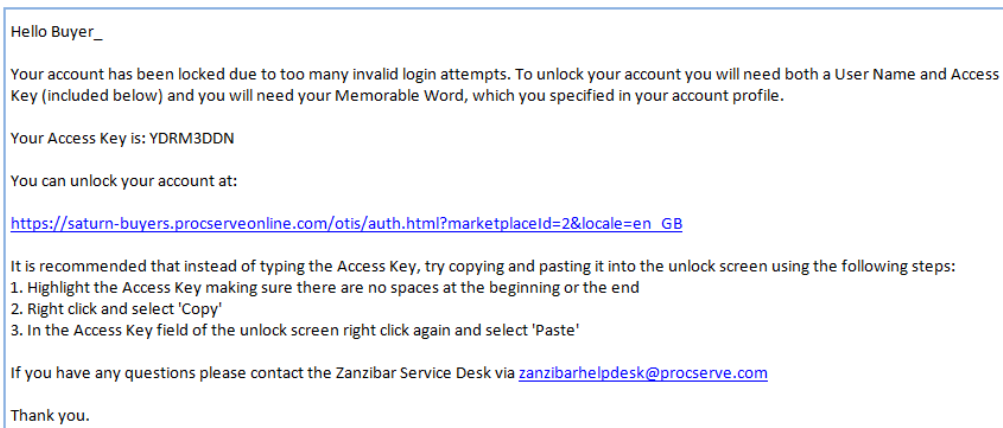
2.1.6 Unlocking your Account

Overview

Your account will be locked if you enter your log in details incorrectly 3 or more times. You will be informed that your account has been locked via an email. You can unlock your own account using your memorable word and the access code contained in the email.

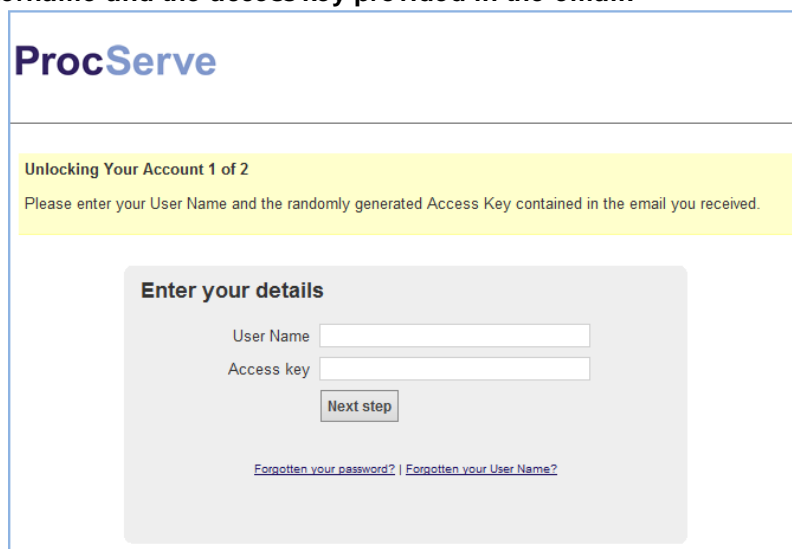
Unlocking your account

1. You will receive an email informing you your account has been locked. Within the email are the details you require to unlock your account:

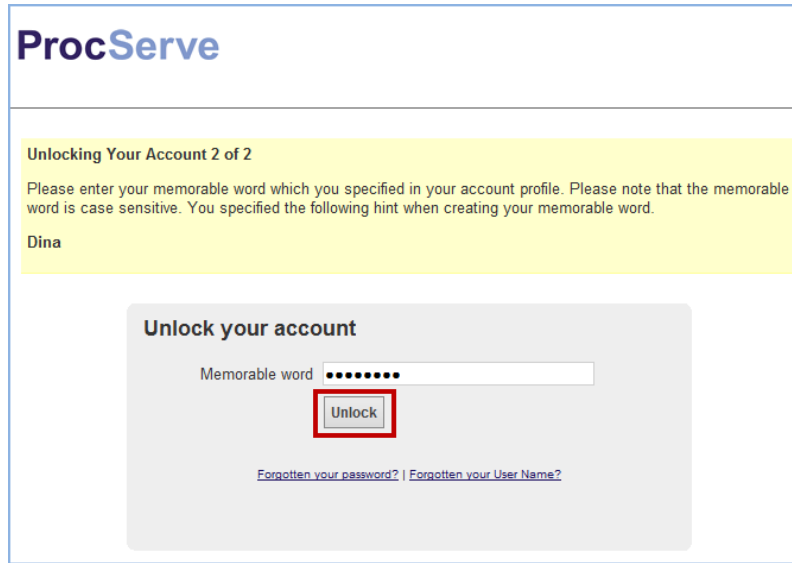


2. Navigate to the url within the email or use the 'Unlock account?' on the login page:

3. Enter your username and the access key provided in the email:

The image shows a screenshot of a web form titled "ProcServe" at the top. Below the title, it says "Unlocking Your Account 1 of 2". A yellow box contains the instruction: "Please enter your User Name and the randomly generated Access Key contained in the email you received." Below this is a grey box titled "Enter your details". Inside this box, there are two input fields: "User Name" and "Access key". Below the "Access key" field is a "Next step" button. At the bottom of the grey box, there are two links: "Forgotten your password?" and "Forgotten your User Name?".

4. Enter the memorable word. You hint will be displayed in the instructions window:



The screenshot shows the ProcServe logo at the top. Below it, a yellow box contains the text "Unlocking Your Account 2 of 2" and instructions: "Please enter your memorable word which you specified in your account profile. Please note that the memorable word is case sensitive. You specified the following hint when creating your memorable word. Dina". Below the yellow box is a grey box titled "Unlock your account". Inside this box, there is a label "Memorable word" followed by a text input field containing ten dots. Below the input field is a button labeled "Unlock", which is highlighted with a red rectangular border. At the bottom of the grey box, there are two links: "[Forgotten your password?](#)" and "[Forgotten your User Name?](#)".

5. Your account is unlocked. If you do not remember your password you can request a new one which will be emailed to you.

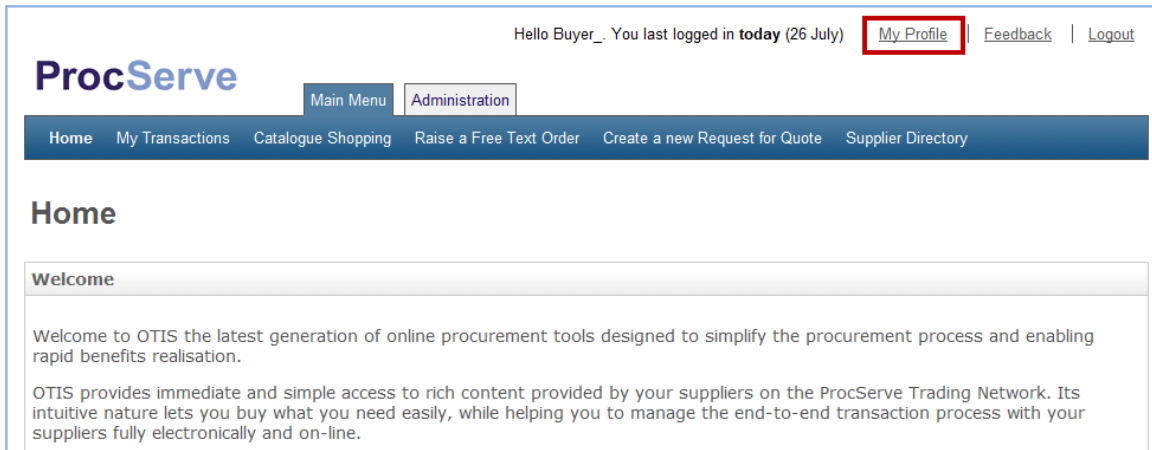
2.1.7 Changing My Password

Overview

You can change your password at any time within 'My Profile'

Changing my password

1. Click on 'My Profile' from any page within Procserve Commerce Hub



Hello Buyer_ You last logged in today (26 July) [My Profile](#) | [Feedback](#) | [Logout](#)

ProcServe

Main Menu Administration

Home My Transactions Catalogue Shopping Raise a Free Text Order Create a new Request for Quote Supplier Directory

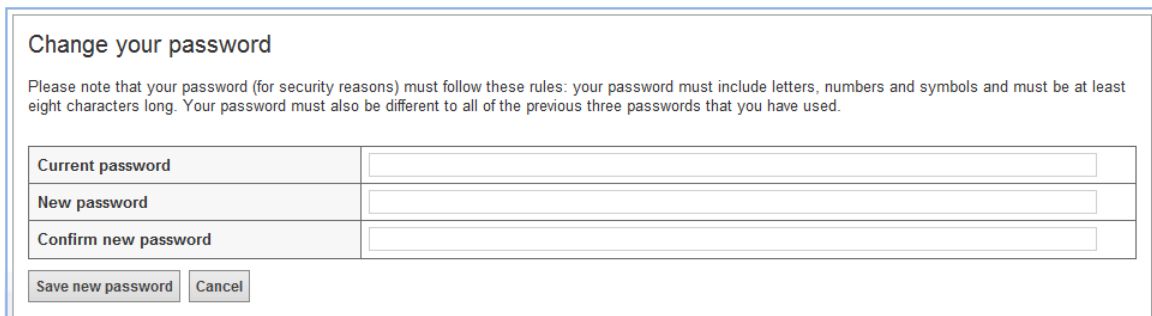
Home

Welcome

Welcome to OTIS the latest generation of online procurement tools designed to simplify the procurement process and enabling rapid benefits realisation.

OTIS provides immediate and simple access to rich content provided by your suppliers on the ProcServe Trading Network. Its intuitive nature lets you buy what you need easily, while helping you to manage the end-to-end transaction process with your suppliers fully electronically and on-line.

2. On the overview screen, scroll down to the 'Change your password' area



Change your password

Please note that your password (for security reasons) must follow these rules: your password must include letters, numbers and symbols and must be at least eight characters long. Your password must also be different to all of the previous three passwords that you have used.

Current password	<input type="password"/>
New password	<input type="password"/>
Confirm new password	<input type="password"/>

3. Enter your old password and what you wish to change it to.

Note: Be aware of the password restrictions within your marketplace that are narrated above the password change fields

4. Click 'Save new password' to save the changes

Note: You can cancel the changes by clicking the 'Cancel' button.

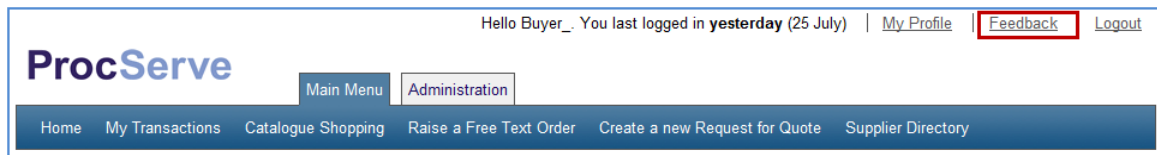
2.1.8 Giving Feedback on Procserve Commerce Hub

Overview

You can use the feedback section to provide Procserve with feedback on the system.

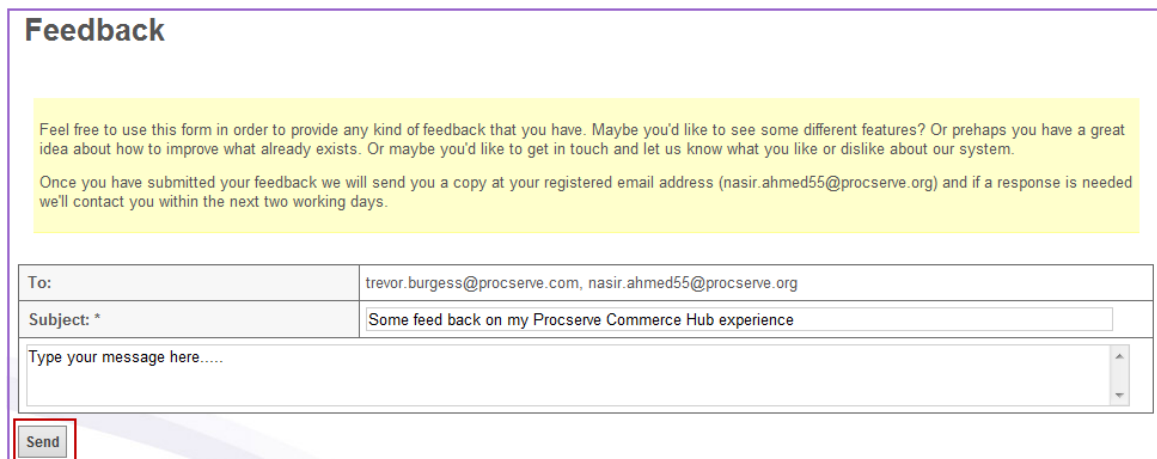
Providing feedback

1. From any screen within Procserve Commerce Hub click 'Feedback':



Header of the Procserve Commerce Hub interface. The top right shows the user is logged in as 'Buyer_' and last logged in yesterday (25 July). Navigation links include 'My Profile', 'Feedback' (highlighted with a red box), and 'Logout'. Below the header is a main menu with 'Main Menu' and 'Administration' tabs. A dark blue navigation bar contains links: 'Home', 'My Transactions', 'Catalogue Shopping', 'Raise a Free Text Order', 'Create a new Request for Quote', and 'Supplier Directory'.

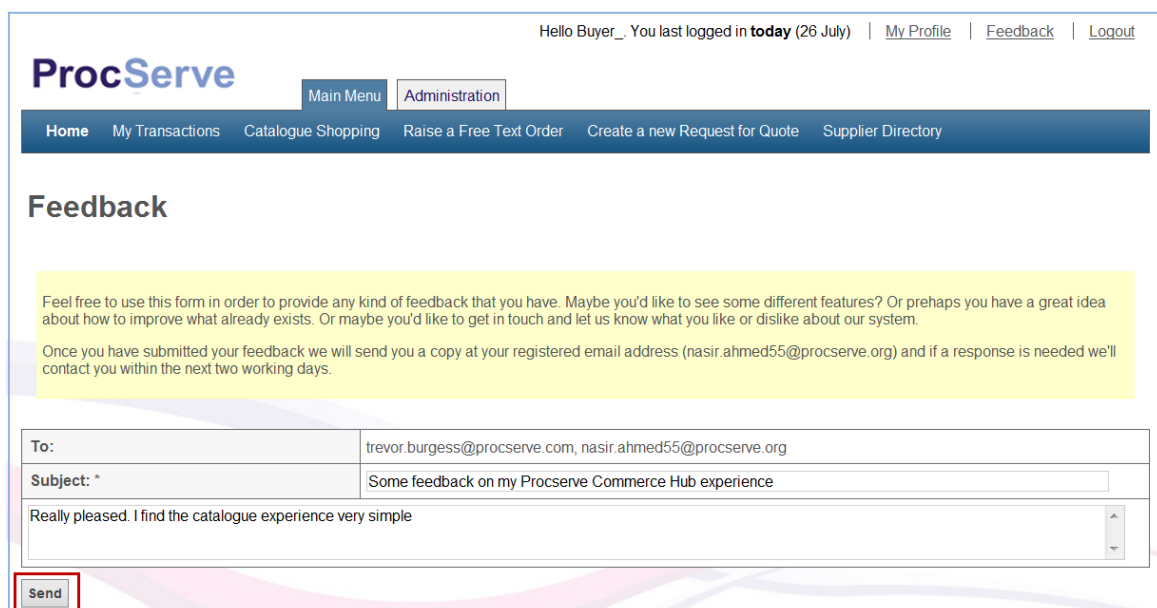
2. Enter your feedback notes and subject in the box provided:



The 'Feedback' form interface. It includes a heading 'Feedback' and a yellow informational box stating: 'Feel free to use this form in order to provide any kind of feedback that you have. Maybe you'd like to see some different features? Or perhaps you have a great idea about how to improve what already exists. Or maybe you'd like to get in touch and let us know what you like or dislike about our system. Once you have submitted your feedback we will send you a copy at your registered email address (nasir.ahmed55@procserve.org) and if a response is needed we'll contact you within the next two working days.' Below this is a form with 'To:' (trevor.burgess@procserve.com, nasir.ahmed55@procserve.org), 'Subject: *' (Some feed back on my Procserve Commerce Hub experience), and a text area for the message. A 'Send' button is highlighted with a red box.

3. Click 'Send'

Your message has now been sent to the system administrators.



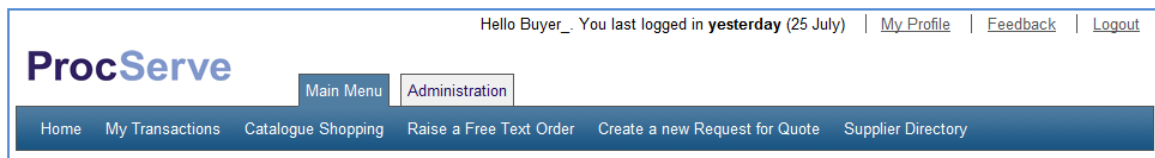
The 'Feedback' form interface after submission. The form fields are the same as in the previous screenshot, but the message text area now contains 'Really pleased. I find the catalogue experience very simple'. The 'Send' button is highlighted with a red box.

2.2 Procserve Commerce Hub Main Menu

2.2.1 Overview

Main Menu Options

Note: Dependent on your organisation set up and roles you have been given, you may not have access to some of the menu options.



1] Home - shows the homepage and any news feeds

2] My Transactions - My Transactions captures your own and your organisations transactions. From within My Transactions you can perform any approvals that may be required on specific document types. You can also view inbound documents and documents you have created.

3] Catalogue Shopping - You can access the marketplace and shop for catalogue items.

4] Create a new Free Text Order - You can shop for non catalogue items. This tool provides a method to keep all transactions within Procserve Commerce Hub.

5] Create a new Request for Quote (RFQ) - You can create a Request for Quote (RFQ) for any good or service where you require a competitive procurement process to take place.

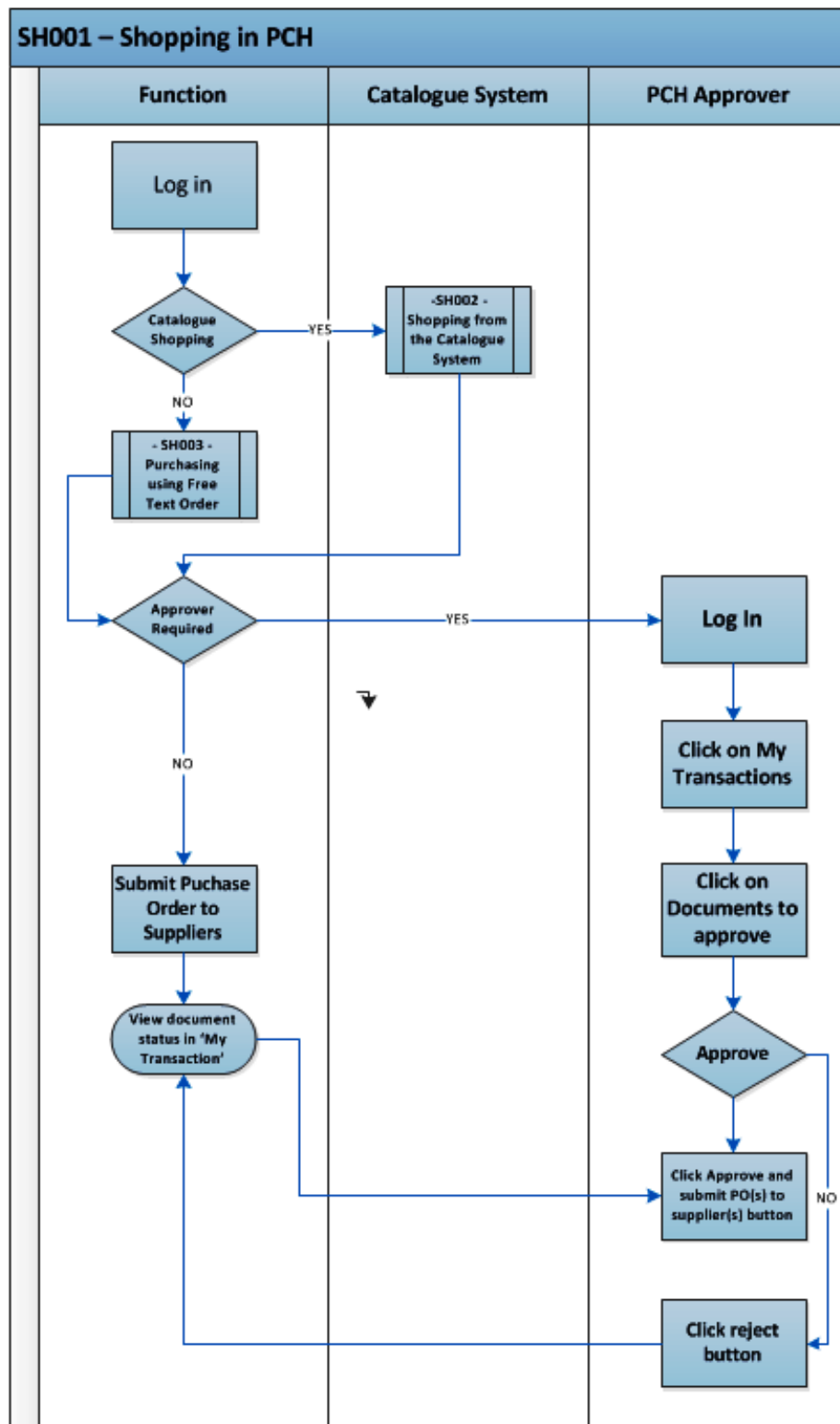
6] Supplier Directory - Supplier Directory allows you to view all suppliers registered on the Procserve Trading Network who are available in your marketplace.

2.2.2 Shopping in Procserve Commerce Hub

2.2.2.1 Shopping Process Flow

Overview

This section describes how you can shop in Procserve Commerce Hub.

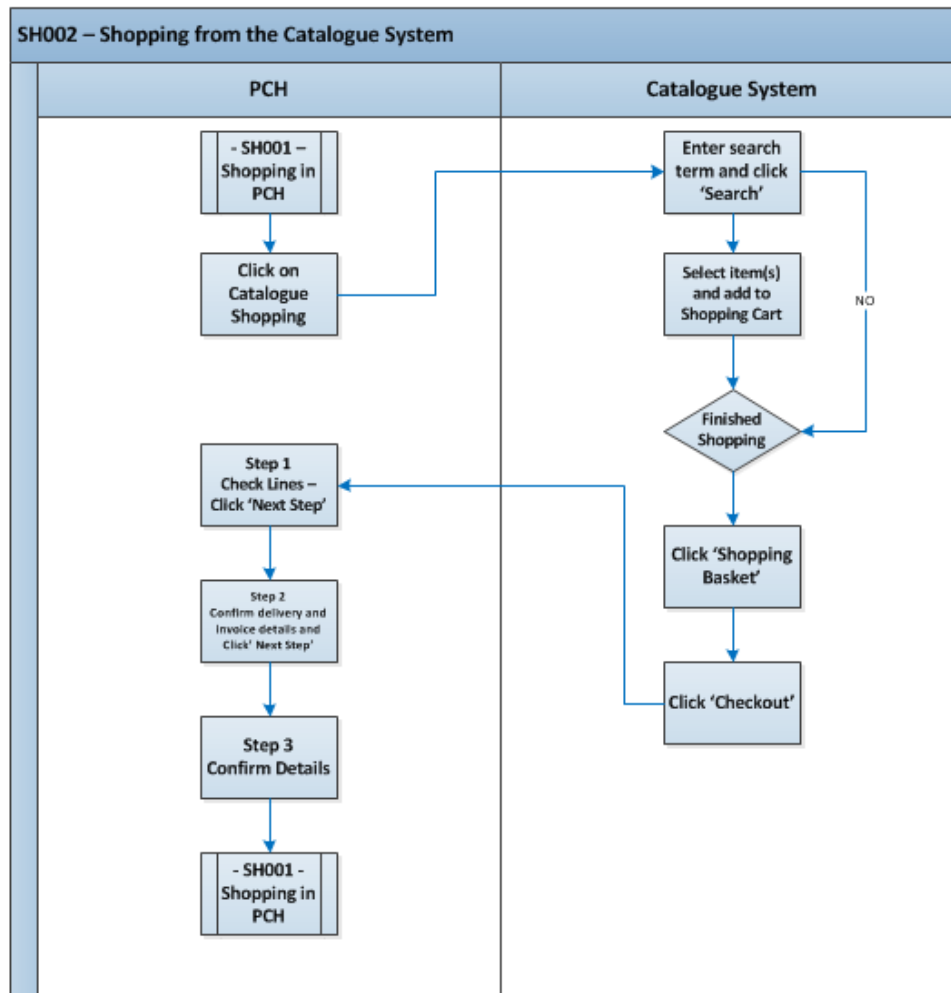


2.2.2.2 Shopping from the Catalogue System

2.2.2.2.1 Shopping from the Catalogue System Overview

Overview

This section describes how you can use the catalogue system to shop for goods and services.

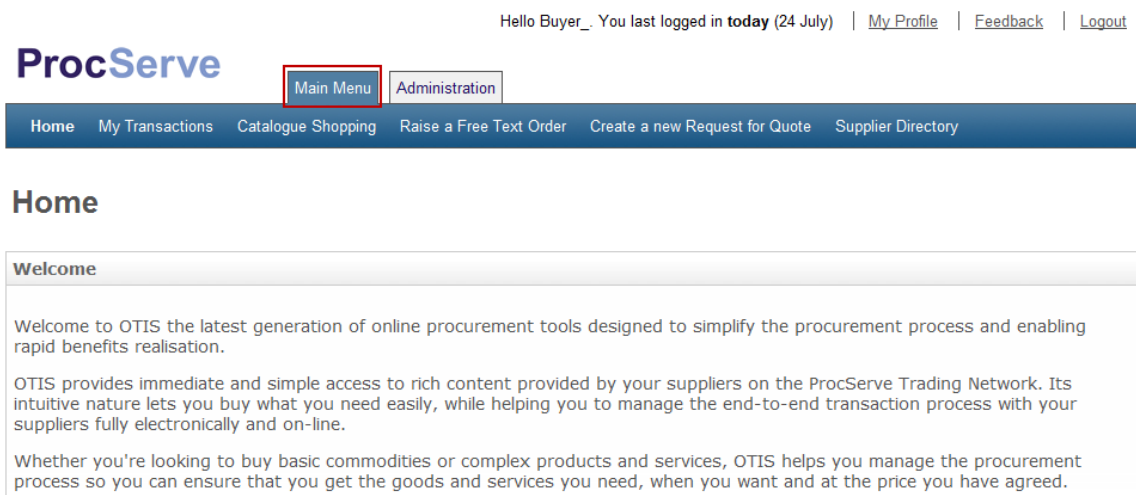
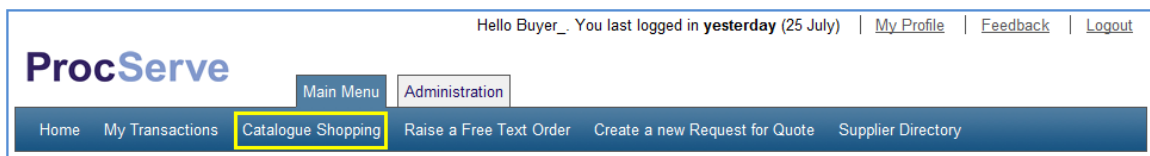


2.2.2.2.2 Simple Guide to Shopping

Overview

You can access the marketplace and complete catalogue shopping.

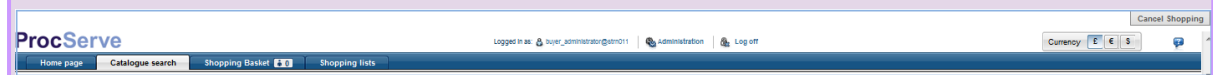
Note: If you can not see 'Catalogue Shopping' you may not have the required role. Please check with your system administrator.

Shopping using the catalogue system**1. Click on the 'Main Menu' tab within Procserve Commerce Hub****2. Click on 'Catalogue Shopping'**

You will be redirected to the marketplace.

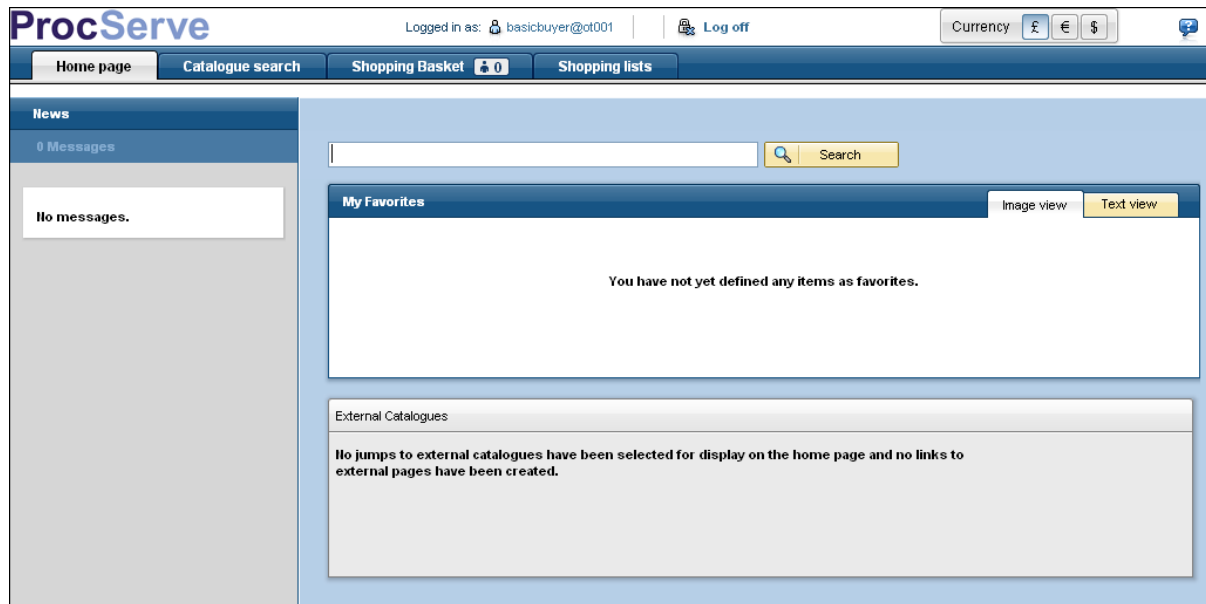
Note: There are multiple ways of searching and using the Procserve Catalogue System to find your items. This section shows a basic search to demonstrate the round trip experience in Procserve Commerce Hub.

Tip! You can exit from the marketplace shopping screen at any point by clicking 'Exit Catalogue Shopping'.

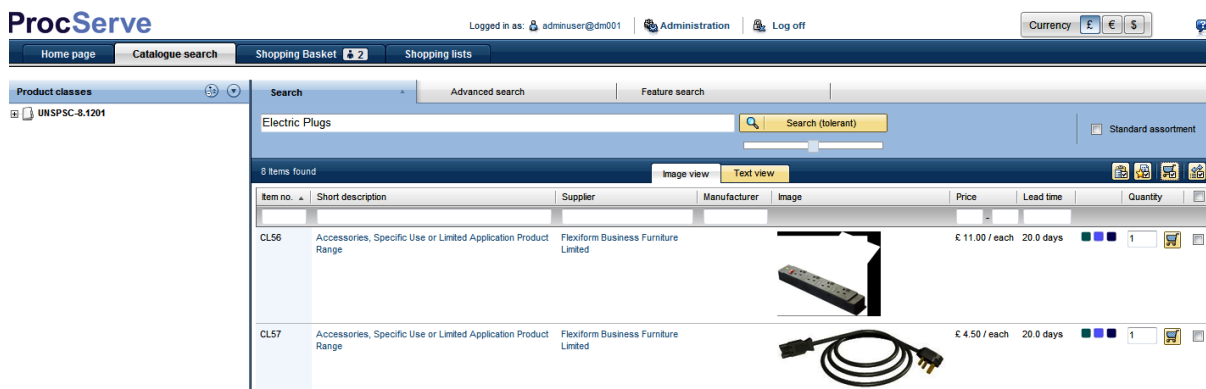


3. In the search bar enter your search term for the goods or services you are trying to procure and click 'Search'. For more information on this see the Catalogue Shopping section.

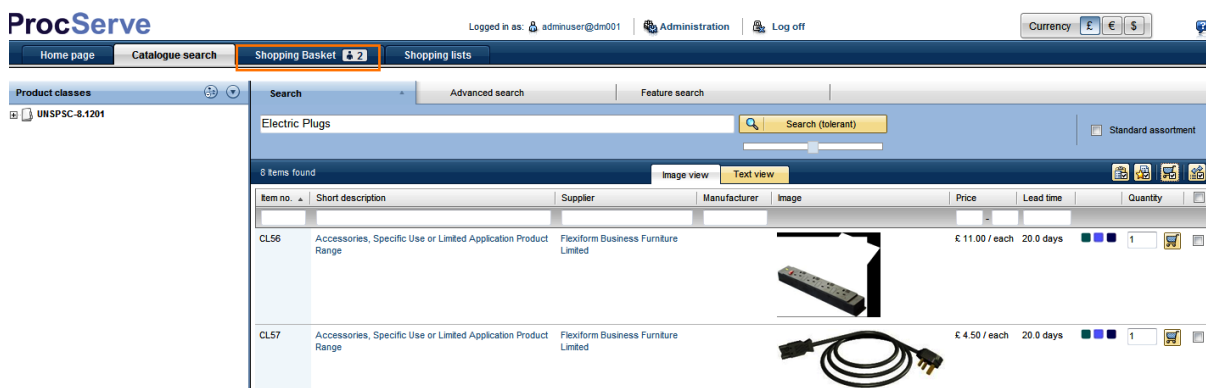
Shopping in Procserve Commerce Hub



4. Select the item you require and add it to the shopping basket



5. When you have finished shopping click 'Shopping Basket'



6. Click Checkout

Shopping in Procserve Commerce Hub

ProcServe

Logged in as: adminuser@dm001 | Administration | Log off

Currency: £ € \$

Home page | Catalogue search | Shopping Basket (2) | Shopping lists

Shopping basket

External catalogs

Item no.	Short description	Supplier / Service provider	Lead time	Price	Quantity	Amount
CL56	Accessories, Specific Use or Limited Application Product Range	Flexiform Business Furniture Limited	20 days	€ 11.00 / each	1	€ 11.00
CL57	Accessories, Specific Use or Limited Application Product Range	Flexiform Business Furniture Limited	20 days	€ 4.50 / each	1	€ 4.50
Total for all GBP items:						€ 15.50

You will redirected back to the Procserve Commerce Hub shopping section where you are required to complete further details

Hello Buyer_ You last logged in today (26 July) | [My Profile](#) | [Feedback](#) | [Logout](#)

ProcServe

Main Menu | Administration

Home | My Transactions | Catalogue Shopping | Raise a Free Text Order | Create a new Request for Quote | Supplier Directory

Shopping

Step 1 - Your basket

Supplier	Item ID.	Description	Quantity	Unit price	Line price
NAZ LTD	1	Cats	5 Each	£9.00	£45.00
NAZ LTD	11	Rabbits	5 Each	£9.00	£45.00
NAZ LTD	10	Computer support furniture	5 Each	£120.00	£600.00
Total					£690.00

Next step Cancel

Step 2 - Confirm delivery and invoicing details

Step 3 - Add payment details

Step 4 - Confirm details and send requisition

7. When you have added in all the items you require click 'Next Step'

Hello Buyer_ You last logged in today (26 July) | [My Profile](#) | [Feedback](#) | [Logout](#)

ProcServe

Main Menu | Administration

Home | My Transactions | Catalogue Shopping | Raise a Free Text Order | Create a new Request for Quote | Supplier Directory

Shopping

Step 1 - Your basket

Supplier	Item ID.	Description	Quantity	Unit price	Line price
NAZ LTD	1	Cats	5 Each	£9.00	£45.00
NAZ LTD	11	Rabbits	5 Each	£9.00	£45.00
NAZ LTD	16	CPU	5 Each	£259.00	£1,295.00
Total					£1,385.00

Next step Cancel

You will next to fill in the Delivery and Invoicing details.

8. Select a target delivery date.

Free Text Order details	
Target delivery date*	DD/MM/YYYY
Special instructions	
Terms and Conditions	
<input type="button" value="Next step"/>	

Note: When you click on the date a calendar drop down will appear where you can add the date.

9. You can enter a different delivery address or use the address that has defaulted from your profile

10. You can enter a different invoice information or use the address that has defaulted from your profile

ProcServe

Hello Buyer_ You last logged in today (26 July) | [My Profile](#) | [Feedback](#) | [Logout](#)

Main Menu Administration

Home My Transactions Catalogue Shopping Raise a Free Text Order Create a new Request for Quote Supplier Directory

Shopping

Step 1 - Your basket

Step 2 - Confirm delivery and invoicing details

Delivery information

Deliver To*	Buyer_ Administrator
Address*	Hoe Street Walthamstow
City / Town*	London
County	
Country*	United Kingdom
Post Code*	E17 4SD
<input type="checkbox"/> Save this address for future	

Invoice information

Invoice To*	Buyer_ Administrator
Address*	Hoe Street Walthamstow
City / Town*	London
County	
Country*	United Kingdom
Post Code*	E17 4SD
<input type="checkbox"/> Save this address for future	

11. When satisfied with your delivery and invoice details click 'Next Step'

12. From here you can enter any payment information

Create a new Free Text Order

Start | Free Text Order Templates | Draft Free Text Orders

Step 1 - Add line items

Step 2 - Add Free Text Order details

Step 3 - Choose supplier

Step 4 - Add payment details

Supplier Name	Payment Method
NAZ LTD	Invoice

Change the payment method for the selected suppliers to:

Step 5 - Confirm details

Tip! A supplier can now select how they can receive payment. To enable different payment methods, the supplier needs to log in to the supplier portal; navigate to 'Edit Organisation'; and on the 'Overview' tab, edit their profile. Further down the page the supplier will have the option to change the payments that can be accepted.

A supplier can use Invoice, Credit / Debit Card and Lodge Cards.

To amend payment details for a supplier in the requisition - tick the box next to the supplier you wish to amend, select the entry from the drop down list and click 'Change':

Step 3 - Add payment details

	Supplier Name	Payment Method
<input checked="" type="checkbox"/>	Flexiform Business Furniture Ltd	Invoice

Change the payment method for the selected suppliers to:

Step 4 - Confirm details and send requisition

You will then be able to enter in the details of the payment card. For example:

Credit / Debit Card:

Supplier Name	Payment Method
Herman Miller Ltd	Invoice

Payment Card Details

Your card number *

Card expiry date * Month: Year:

Lodged Card:

Payment Card Details	
Supplier Name	Lodged Card Number
Herman Miller Ltd	<input type="text"/>
<input type="button" value="Save"/> <input type="button" value="Cancel"/>	

Once complete click **'Save'**.

Procserve ePayment method:

From dropdown list select 'Procserve ePayment' and click on **'Change'**, then click on **'Next step'**

Step 3 - Add payment details		
<input checked="" type="checkbox"/>	Supplier Name	Payment Method
<input checked="" type="checkbox"/>	Flexiform Business Furniture Ltd	Invoice
Change the payment method for the selected suppliers to: ProcServe ePayment <input type="button" value="Change"/>		
<input type="button" value="Next step"/>		
Step 4 - Confirm details and send requisition		

Step 3 - Add payment details	
Supplier Name	Payment Method
Flexiform Business Furniture Ltd	Invoice
Payment Card Details	
Card alias *	<input type="text" value="Enter card alias name"/>
<input type="button" value="Save"/> <input type="button" value="Cancel"/>	
Step 4 - Confirm details and send requisition	

Enter the credit card alias name and then click on **'Save'**

Step 3 - Add payment details		
<input checked="" type="checkbox"/>	Supplier Name	Payment Method
<input checked="" type="checkbox"/>	Flexiform Business Furniture Ltd	ProcServe ePayment
Change the payment method for the selected suppliers to: ProcServe ePayment <input type="button" value="Change"/>		
<input type="button" value="Next step"/>		
Step 4 - Confirm details and send requisition		

At Step 3, click on **'Next step'**

13. When complete click 'Save' or 'Next Step'

You will be taken to a confirmation screen. From here you can review the details order. For example:

ProcServe Main Menu Administration

Home My Transactions Catalogue Shopping Raise a Free Text Order Create a new Request for Quote Supplier Directory

Shopping

Step 1 - Your basket

Step 2 - Confirm delivery and invoicing details

Step 3 - Add payment details

Step 4 - Confirm details and send requisition

Please read this requisition and check that the details are correct before submitting it.

Creation date	26 Jul 2012 17:04 BST	Invoice To	Buyer_ Administrator Hoe Street Walthamstow London E17 4SD GB
Deliver To	Buyer_ Administrator Hoe Street Walthamstow London E17 4SD GB	Telephone number	020861237461
Target delivery date	31/07/2012	Tax number	GB891208789

Supplier	Item ID.	Description	Quantity	Unit price	Line price
NAZ LTD	1	Cats	5 Each	£9.00	£45.00
NAZ LTD	11	Rabbits	5 Each	£9.00	£45.00
NAZ LTD	10	Computer support furniture	5 Each	£120.00	£600.00
Total					£690.00

NAZ LTD
Categories: Travel
LONDON, E17 4SD
Telephone number: +442073331623
Email: passr.ahmed@procserve.com
Payment: Invoice

Special instructions

Document history

- This requisition has yet to be submitted

Submit for approval

Submit for approval by * Admin_Nas

Notes

Submit for approval Cancel Edit before submitting

Tip! Should you wish to edit any details you can click the 'Edit before submitting' button at the footer of the page

Note: Dependant on your organisations set up you may require approval before the order is sent to the supplier.

Tip! If you have used a Credit / Debit Card or a Lodged Card, the payment details will appear on the summary page.

Organisations Requiring Approval

14. In the Submit for approval box select an approver for the list of names available

13. Once you have selected an approver, click 'Submit for approval'

Note: When a document is submitted for approval, the recipient will be informed via email that there is a document awaiting there action.

You will be redirected to 'My Transactions' where you will see your Requisition/Order with a status update message.

Hello Buyer_ You last logged in **today** (26 July) | [My Profile](#) | [Feedback](#) | [Logout](#)

ProcServe

[Main Menu](#) [Administration](#)

[Home](#) [My Transactions](#) [Catalogue Shopping](#) [Raise a Free Text Order](#) [Create a new Request for Quote](#) [Supplier Directory](#)

My Transactions

[Document Management](#) [My Organisation's Documents](#) [Document Tracking](#)

Success! The Requisition below has been sent to Admin_Nas for approval. Once it has been approved you will be able to track the resulting Purchase Order (s) in your [Sent documents list](#)

Requisition number 2415

Submission date	26 Jul 2012 (17:11 BST)	Invoice to	SATURN LTD Buyer_Administrator Hoe Street Walthamstow London E17 4SD United Kingdom		
Deliver to	SATURN LTD Buyer_Administrator Hoe Street Walthamstow London E17 4SD United Kingdom	Telephone number	020861237461		
Deliver by	31 Jul 2012	Tax number	GB891208789		

Supplier	Item ID	Description	Quantity	Unit price	Total price
NAZ LTD	1	Cats	5 Each	£9.00	£45.00
NAZ LTD	11	Rabbits	5 Each	£9.00	£45.00

The approver you forwarded the requisition to will now be able to log in and approve or reject your requisition. The requester will receive an email when the requisition has been approved.

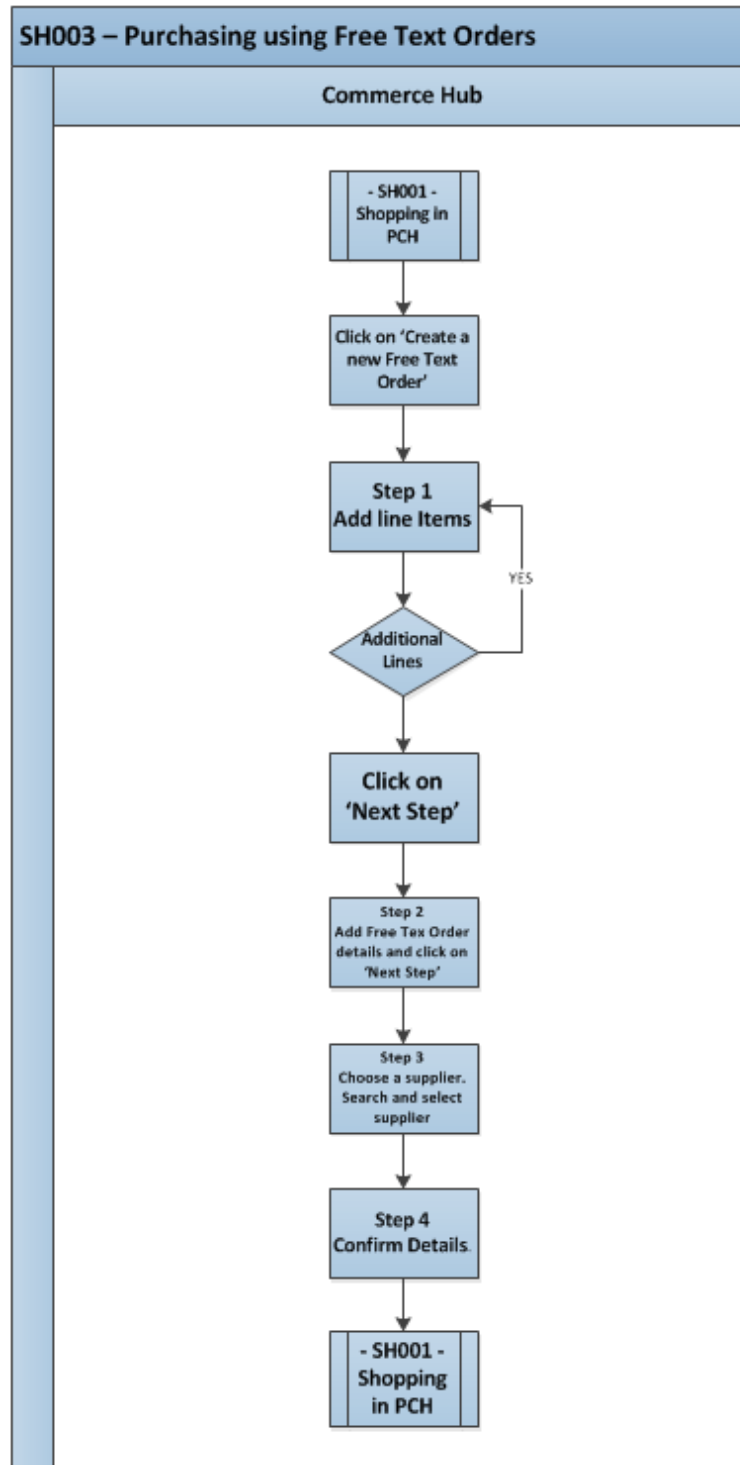
Tip! For more information on the catalogue system view the remainder of this section.

2.2.2.3 Purchasing using Free Text Orders

2.2.2.3.1 Purchasing using FTOs Overview

Overview

This section describes how you can create Free Text Orders using Procserve Commerce Hub.



2.2.2.3.2 Creating Free Text Orders

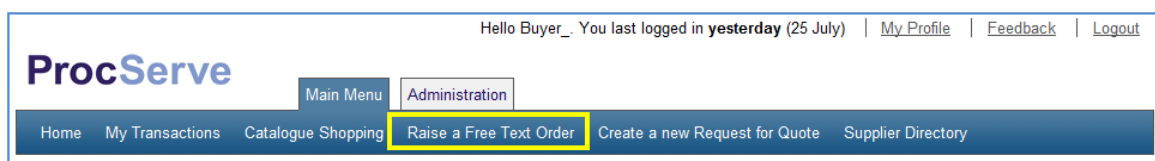
Overview

You can request items that may not be in the catalogue system. This tool provides a method to keep all transactions within Procserve Commerce Hub.

Note: If you can not see 'Free text orders' you may not have the required role. Please check with your system administrator.

Creating a Free text order

1. Click on the 'Main Menu' tab within Procserve Commerce Hub
2. Click on 'Create a new Free Text Order'



3. Add the item details in step 1 and click 'Add'

The screenshot shows the 'Create a new Free Text Order' form. At the top, it says 'Hello Buyer_ You last logged in yesterday (25 July)' with links for 'My Profile', 'Feedback', and 'Logout'. Below this is a navigation bar with tabs for 'Main Menu' and 'Administration'. Under 'Main Menu', there are links for 'Home', 'My Transactions', 'Catalogue Shopping', 'Raise a Free Text Order' (highlighted with a yellow box), 'Create a new Request for Quote', and 'Supplier Directory'.

The main section is titled 'Create a new Free Text Order'. Below this are tabs for 'Start', 'Free Text Order Templates', and 'Draft Free Text Orders'. The 'Start' tab is selected.

The 'Step 1 - Add line items' section is active. It contains a table with the following data:

Item Name*	Item Description*	Quantity*	Unit price*	
Pens	Black in ball point pens	200.0 Each	£0.80	Edit Remove

Below the table, there are input fields for 'Item Name', 'Item Description', 'Quantity', and 'Unit price'. There is also an 'Attachment' field with a 'Browse...' button. An 'Add' button is located to the right of the input fields.

At the bottom of the form, there are 'Next step' and 'Cancel' buttons.

4. When you have added in all the items you require click 'Next Step'

Create a new Free Text Order

[Start](#)
[Free Text Order Templates](#)
[Draft Free Text Orders](#)

Step 1 - Add line items

Item Name*	Item Description*	Quantity*	Unit price*	
Pens	Black ink ball point pens	200.0 Each	£0.85	Edit Remove
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="button" value="Add"/>
Attachment:		<input type="button" value="Browse..."/>		

Tip! You can edit or remove an item from your free text order by clicking the 'Edit' or 'Remove' button

5. Select a target delivery date.

Free Text Order details

Target delivery date*	<input type="text" value="DD/MM/YYYY"/>
Special instructions	<input type="text"/>
Terms and Conditions	<input type="text"/>

Note: When you click on the date a calendar drop down will appear where you can add the date.

6. You can enter a different delivery address or use the address that has defaulted from your profile

7. You can enter a different invoice information or use the address that has defaulted from your profile

ProcServe

Main Menu Administration

Home My Transactions Catalogue Shopping Raise a Free Text Order Create a new Request for Quote Supplier Directory

Shopping

Step 1 - Your basket

Step 2 - Confirm delivery and invoicing details

Delivery information

Deliver To*	Buyer_Administrator
Address*	Hoe Street Walthamstow
City / Town*	London
County	
Country*	United Kingdom ▼
Post Code*	E17 4SD
<input type="checkbox"/> Save this address for future	

Invoice information

Invoice To*	Buyer_Administrator
Address*	Hoe Street Walthamstow
City / Town*	London
County	
Country*	United Kingdom ▼
Post Code*	E17 4SD
<input type="checkbox"/> Save this address for future	

8. When satisfied with your delivery and invoice details click 'Next Step'

This will take you to the supplier selection screen.

Create a new Free Text Order

[Start](#) [Free Text Order Templates](#) [Draft Free Text Orders](#)

Step 1 - Add line items

Step 2 - Add Free Text Order details

Step 3 - Choose supplier

Find available suppliers

Search for

Search for suppliers above.

Step 4 - Add payment details

Step 5 - Confirm details




9. You can either free text search for a supplier or use the category drop down to filter the available suppliers in your marketplace

Step 3 - Choose supplier

Find available suppliers

Search for

3 suppliers found

	NAZ LTD Categories: Travel LONDON, E17 4SD <input type="button" value="Use this supplier"/>	
DEMO	NAZ STORES LTD Categories: Defence LONDON, E14 6AH <input type="button" value="Use this supplier"/>	

10. When you have found the desired supplier you can select it by clicking 'Use this supplier'

11. On the following screen you will be prompted to enter any payment information

Create a new Free Text Order

[Start](#)
[Free Text Order Templates](#)
[Draft Free Text Orders](#)

Step 1 - Add line items

Step 2 - Add Free Text Order details

Step 3 - Choose supplier

Step 4 - Add payment details

Supplier Name	Payment Method
NAZ LTD	Invoice

Change the payment method for the selected suppliers to:

Step 5 - Confirm details

Tip! A supplier can now select how they can receive payment. To enable different payment methods, the supplier needs to log in to the supplier portal; navigate to 'Edit Organisation'; and on the 'Overview' tab, edit their profile. Further down the page the supplier will have the option to change the payments that can be accepted.

Financial information

Tax code	<input type="text" value="VAT_Standard"/>
Tax Number	<input type="text" value="GB60812378"/>
Payments accepted	<input type="checkbox"/> BACS transfer <input type="checkbox"/> Cash <input type="checkbox"/> Cheque <input checked="" type="checkbox"/> Credit Card <input checked="" type="checkbox"/> Debit Card <input type="checkbox"/> Direct Debit <input checked="" type="checkbox"/> Lodged Card <input checked="" type="checkbox"/> ProcServe ePayment
Merchant capacity	<input type="text" value="0"/>
Currencies accepted	<input checked="" type="checkbox"/> £ Pounds sterling <input type="checkbox"/> \$ US dollar <input type="checkbox"/> € Euro

A supplier can use Invoice, Credit / Debit Card and Lodge Cards and Procserve ePayment.

To amend payment details for a supplier in the requisition - tick the box next to the supplier you wish to amend, select the entry from the drop down list and click 'Change':

Step 3 - Add payment details

Supplier Name	Payment Method
<input checked="" type="checkbox"/> Flexiform Business Furniture Ltd	Invoice

Change the payment method for the selected suppliers to: Invoice Change

Next step

Step 4 - Confirm details and send requisition

You will then be able to enter in the details of the payment or lodged card

Supplier Name	Payment Method
Herman Miller Ltd	Invoice

Payment Card Details

Your card number *

Card expiry date * Month: -- Year: ----

Save Cancel

For payment by Procserve ePayment system, you need to have an credit card alias name. Enter the alias name as below:

Step 3 - Add payment details

Supplier Name	Payment Method
Flexiform Business Furniture Ltd	Invoice

Payment Card Details

Card alias * Enter card alias name

Save Cancel

Step 4 - Confirm details and send requisition

Once complete click 'Save'.

12. When complete click 'Save' or 'Next Step'

You will be taken to a confirmation screen. From here you can review the details of the Free Text Order.

Hello Buyer_ You last logged in today (26 July) | [My Profile](#) | [Feedback](#) | [Logout](#)

ProcServe [Main Menu](#) [Administration](#)

[Home](#) [My Transactions](#) [Catalogue Shopping](#) [Raise a Free Text Order](#) [Create a new Request for Quote](#) [Supplier Directory](#)

Create a new Free Text Order

[Start](#) [Free Text Order Templates](#) [Draft Free Text Orders](#)

Step 1 - Add line items

Step 2 - Add Free Text Order details

Step 3 - Choose supplier

Step 4 - Add payment details


Step 5 - Confirm details

Please read over this order and check that the details are correct before submitting it.

Creation date	26 Jul 2012 16:59 BST	Invoice To	Buyer_ Administrator Hoe Street Walthamstow London E17 4SD GB
Deliver To	Buyer_ Administrator Hoe Street Walthamstow London E17 4SD GB	Telephone number	020861237461
Target delivery date	31/07/2012	Tax number	GB891208789

Item Name	Item Description	Quantity	Target Price (per unit)	Total price
Pens	Black in ball point pens	200.0 Each	£0.80	£160.00
Total				£160.00

This purchase order will be sent to



NAZ LTD
 Categories: Travel
 LONDON, E17 4SD
 Telephone number: +442073331623
 Email: nasir.ahmed@procserve.com
 Payment: Invoice

Special instructions

Document history

- This order has yet to be submitted

submit for approval

Submit for approval by *	Admin_Nas
Notes	

[Submit for approval](#)
[Save as Template](#)
[Save as Draft](#)
[Edit before submitting](#)
[Cancel](#)

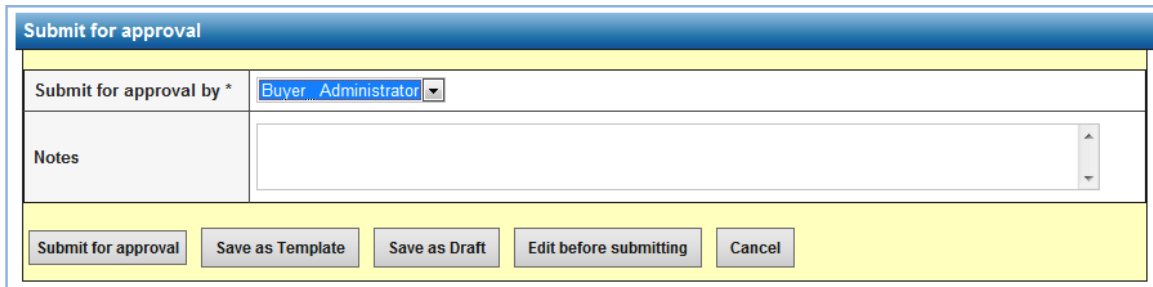
Tip! Should you wish to edit any details you can click the 'Edit before submitting' button at the footer of the page

Tip! If you have used a Credit / Debit Card or a Lodged Card, the payment details will appear on the summary page.

Dependant on your organisations set up you may require approval before the order is sent to the

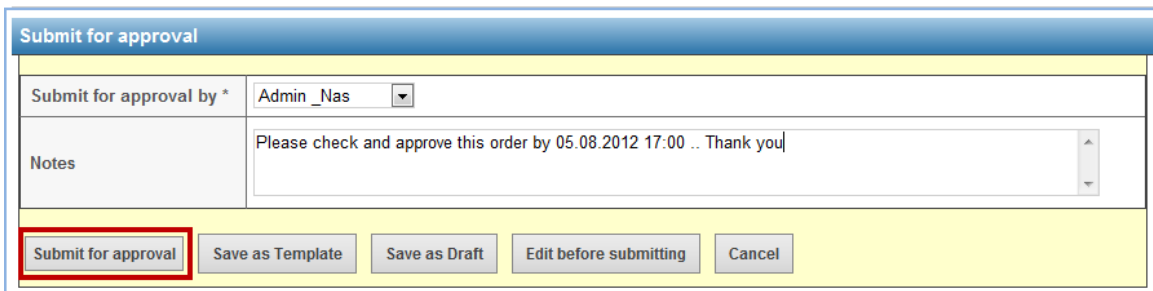
supplier.

13. In the Submit for approval box select an approver for the list of names available



Submit for approval	
Submit for approval by *	Buyer... Administrator
Notes	
<input type="button" value="Submit for approval"/> <input type="button" value="Save as Template"/> <input type="button" value="Save as Draft"/> <input type="button" value="Edit before submitting"/> <input type="button" value="Cancel"/>	

14. Once you have selected an approver, click 'Submit for approval'



Submit for approval	
Submit for approval by *	Admin _Nas
Notes	Please check and approve this order by 05.08.2012 17:00 .. Thank you
<input type="button" value="Submit for approval"/> <input type="button" value="Save as Template"/> <input type="button" value="Save as Draft"/> <input type="button" value="Edit before submitting"/> <input type="button" value="Cancel"/>	

Note: The approver will receive an email informing them of a requisition pending their action.

You will be redirected to 'My Transactions' where you will see your Requisition/Order with a status update message.

Hello Buyer_ You last logged in **today** (26 July) | [My Profile](#) | [Feedback](#) | [Logout](#)

ProcServe

[Main Menu](#) [Administration](#)

[Home](#) [My Transactions](#) [Catalogue Shopping](#) [Raise a Free Text Order](#) [Create a new Request for Quote](#) [Supplier Directory](#)

My Transactions

[Document Management](#) [My Organisation's Documents](#) [Document Tracking](#)

Success! The Requisition below has been sent to Admin_Nas for approval. Once it has been approved you will be able to track the resulting Purchase Order (s) in your [Sent documents list](#).

Requisition number 2415

Submission date	26 Jul 2012 (17:11 BST)	Invoice to	SATURN LTD Buyer_Administrator Hoe Street Walthamstow London E17 4SD United Kingdom		
Deliver to	SATURN LTD Buyer_Administrator Hoe Street Walthamstow London E17 4SD United Kingdom	Telephone number	020861237461		
Deliver by	31 Jul 2012	Tax number	GB891208789		

Supplier	Item ID	Description	Quantity	Unit price	Total price
NAZ LTD	1	Cats	5 Each	£9.00	£45.00
NAZ LTD	11	Rabbits	5 Each	£9.00	£45.00

The approver you forwarded the requisition to will now be able to log in and approve or reject your requisition. Once approved, the requester will receive email confirmation that it has been approved.

2.2.3 Creating a Request for Quote

2.2.3.1 Introduction to RFQ

Overview

You can use OTIS to send Request For Quotes (RFQ's) to suppliers that are members of your trading community or marketplace. In addition, OTIS allows all responding Quotes from these suppliers to be linked to the originating RFQ for audit trail purposes.

Responding Quotes that are selected as winning bids are automatically converted to Purchase Orders so no re-keying of data is required.

Note: You may not be able to complete an RFQ if you do not have the required roles.

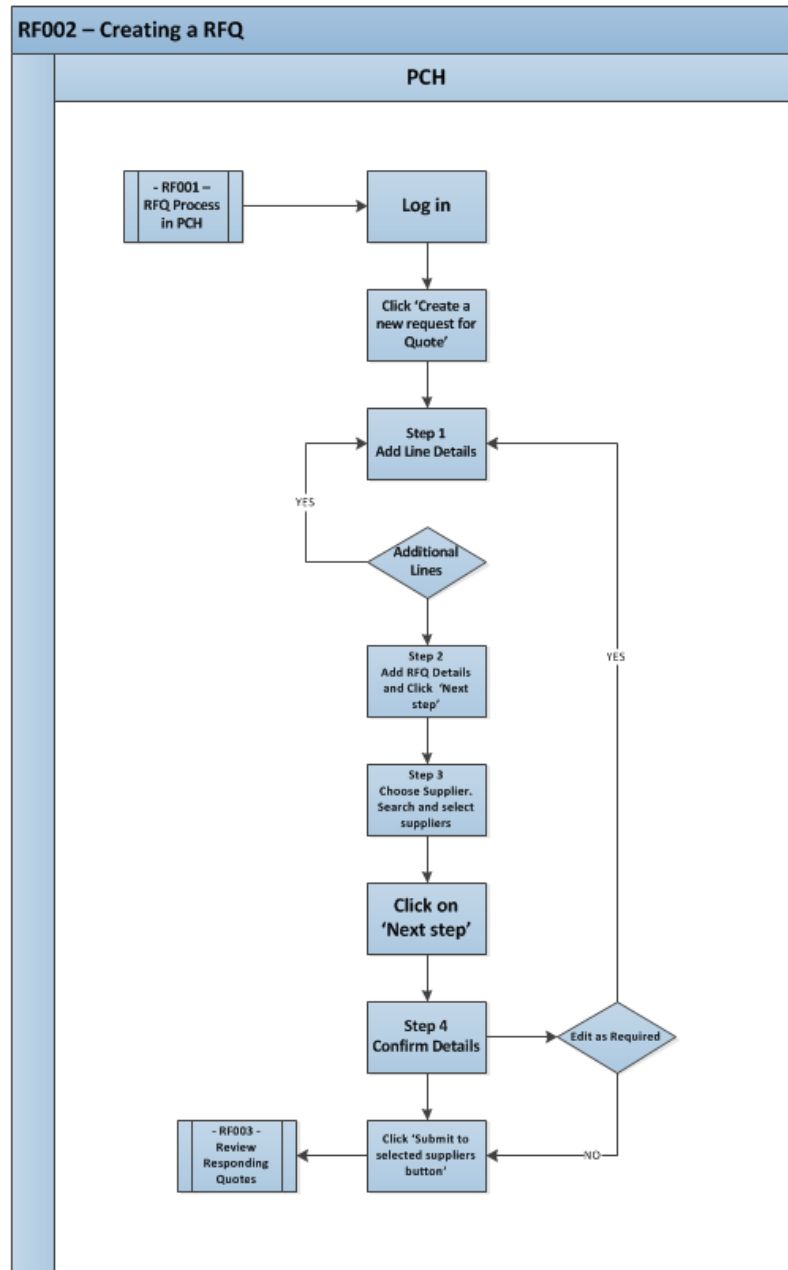
Note: You should always consider your organisations procurement rules before undertaking an RFQ.



2.2.3.2 Raising a Request for Quote

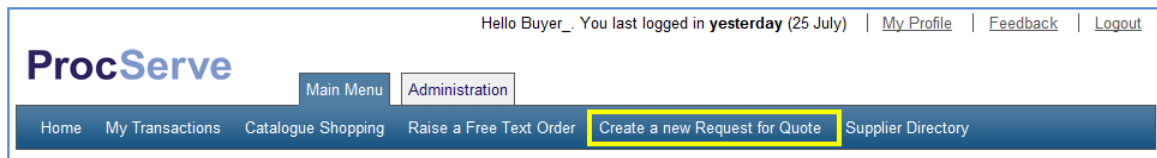
Overview

This section shows how you can create a Request for Quote.



Creating an RFQ

1. Log in to Procserve Commerce Hub.
2. Click 'Create a new Request for Quote'



3. Add in the item details for the first line of your RFQ

 This screenshot shows the 'Create a new Request for Quote' form. At the top, it says 'Create a new Request for Quote' with tabs for 'Start', 'Request for Quotation Templates', and 'Draft Request for Quotations'. Below this is a section titled 'Step 1 - Add line items'. It contains a table with the following columns: 'Item Name*', 'Item Description*', 'Quantity*', and 'Target Price (per unit)'. The 'Item Name' and 'Item Description' fields are empty. The 'Quantity' field has a dropdown menu showing 'Each'. The 'Target Price' field is empty. There is an 'Add' button to the right of the table. Below the table is an 'Attachment:' field with a 'Browse...' button. At the bottom left of the table is a 'Cancel' button. Below the table are four steps: 'Step 1 - Add line items', 'Step 2 - Add RFQ details', 'Step 3 - Choose suppliers', and 'Step 4 - Confirm details'.

Tip! Depending on what you are buying it can be good practice to put in a target price. For example, if you are buying some playground equipment - by putting in a target price you are informing the supplier about your budget and therefore to what scale there offer should be.

4. Click 'Add'

Note: You can add in multiple lines to complete your RFQ.

5. When complete click 'Next Step'

Create a new Request for Quote

Start Request for Quotation Templates Draft Request for Quotations

Step 1 - Add line items

Item Name*	Item Description*	Quantity*	Target Price (per unit)	
Pens	Black ink ball point pens	200.0 Each	£0.80	Edit Remove
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="button" value="Add"/>
Attachment: <input type="text"/>		Each	<input type="button" value="Browse..."/>	

Step 2 - Add RFQ details

Step 3 - Choose suppliers

Step 4 - Confirm details

6. Add the details of the RFQ such as the expiry and delivery requirements

Free Text Order details

Target delivery date*	<input type="text" value="DD/MM/YYYY"/>
Special instructions	<input type="text"/>
Terms and Conditions	<input type="text"/>

August 2012

Su	Mo	Tu	We	Th	Fr	Sa
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

Step 3 - Choose supplier

Step 4 - Add payment details

Step 5 - Confirm details

Note: Select a date from when this should expire field to define when the RFQ expires. This date will be shown within the RFQ sent to the supplier.

Tip! Adding a reminder in an RFQ sends you a reminder via email that the RFQ is coming to an end. You can define how many days before the RFQ closes you would like to receive this email from the drop down.

7. When satisfied with the terms of the RFQ, click 'Next Step'

8. You then need to search and select some suppliers to submit the RFQ too. You can select search for a supplier using the 'Find available suppliers' search engine:





Creating a Request for Quote

Step 3 - Choose suppliers

Find available suppliers
[Use category search](#)

for

3 suppliers found.

	NAZ LTD Categories: Travel LONDON, E17 4SD <input type="button" value="Add this supplier"/>	
	NAZ STORES LTD Categories: Defence LONDON, E14 6AH <input type="button" value="Add this supplier"/>	

Your chosen suppliers (0)
 (These suppliers will be sent this RFQ)

There are no suppliers in your list

To add a supplier to this list; search for them and then click on the supplier you'd like to contact. If you make a mistake, you can remove the supplier from this list by clicking on it again.

9. Or you can use the category search to identify suppliers who provide the commodity you are interested in from the regions you require:

Step 3 - Choose suppliers

Find available suppliers
[Use category search](#)

for

Your chosen suppliers (0)
 (These suppliers will be sent this RFQ)

10. From within here you can search for categories and locations or drill through the hierarchy until you reach the desired commodity / location:

Step 3 - Choose suppliers

Find available suppliers
[Use supplier search](#)

Please select a category and a location below to start the supplier search

Categories Search categories <input type="text"/> <input type="button" value="Search"/> <ul style="list-style-type: none"> Defence Emergency and Rescue Energy and Fuels Engineering Goods Facilities Fleet ICT Commodities ICT Systems Industrial Services Learning and Development Legal Aid Logistics Office Solutions Operational Goods and Services Personnel Related Print and Print Management Professional Services - CCL 	Locations Search locations <input type="text"/> <input type="button" value="Search"/> <ul style="list-style-type: none"> United Kingdom of Great Britain and Northern Ireland <ul style="list-style-type: none"> England <ul style="list-style-type: none"> Bath and North East Somerset Bedford Borough of Barnsley Borough of Blackburn with Darwen Borough of Blackpool Borough of Bolton Borough of Bournemouth Borough of Bracknell Forest Borough of Brighton and Hove Borough of Bury Borough of Calderdale Borough of Darlington Borough of Doncaster Borough of Dudley Borough of Halton
--	--

11. Once you have found suppliers that meet the your requirements click 'Add all'

Creating a Request for Quote

Step 3 - Choose suppliers

Find available suppliers
[Use supplier search](#)

Your selection matches (7) suppliers

Add all

Categories
 Search categories Search

- ICT Commodities
- ICT Systems
- Industrial Services
- Learning and Development
- Legal Aid
- Logistics
- Office Solutions
- Operational Goods and Services
- Personnel Related
- Print and Print Management
- Professional Services - CCL
- Professional Services Other
- Social Care
- Travel
- Uncategorised
- Waste Management
- Welfare to Work

Locations
 Search locations Search

- County of Suffolk
- County of Surrey
- County of Warwickshire
- County of West Sussex
- County of Wiltshire
- County of Worcestershire
- District of East Riding of Yorkshire
- District of Rutland
- District of Telford and Wrekin
- District of Wokingham
- Gateshead
- Greater London
- Isles of Scilly
- North East Lincolnshire
- North Lincolnshire
- North Somerset

Step 4 - Confirm details

You should be then presented with the suppliers that you have selected in your chosen suppliers list:

Step 3 - Choose suppliers

Find available suppliers
[Use category search](#)

for Naz Go

1 suppliers found.

DEMO NAZ STORES LTD
 Categories: Defence
 LONDON, E14 6AH
 Add this supplier

Showing 1 - 1 of 1 suppliers

Your chosen suppliers (2)
 (These suppliers will be sent this RFQ)


DEMO NAZ4TECH LTD
 Categories: Travel
 LONDON, E17 8JQ
 Remove this supplier

DEMO NAZ LTD
 Categories: Travel
 LONDON, E17 4SD
 Remove this supplier

Next step

Step 4 - Confirm details

Tip! You can remove a supplier from the targeted suppliers list by clicking 'Remove this supplier'

 **Tenet ITMapping Ltd**
 Categories:
 Horsham, RH12 5UX
 Remove this supplier

12. Click 'Next step' at the bottom of the page once you have all the suppliers you require to

target with your RFQ.

13. You can then confirm the details of the RFQ, edit the content as required, and submit to the suppliers selected.


Step 4 - Confirm details

Please read over this RFQ and check that the details are correct before submitting it.


Creation date	09 Aug 2012 18:51 BST	Invoice To	Admin Buyer 123 Buckingham Palace Road London
Deliver To	Admin Buyer 123 Buckingham Palace Road London SW1W 9SR GB	Telephone number	11112223333
Closing date	09 Aug 2012 17:00 BST	Tax number	GB896745129
Target delivery date	29/08/2012		

Item Name	Item Description	Quantity	Target Price (per unit)
Pens	Black ink ball point pens	200.0 Each	£0.80
Total			£160.00

This RFQ will be sent to the following suppliers



NAZ4TECH LTD
Categories: Office Solutions
LONDON, E17 8JQ
Telephone number: +442073336162
Email: nasir.ahmed@procserve.com
Payment: Invoice



NAZ LTD
Categories: Office Solutions
LONDON, E17 4SD
Telephone number: +442073331623
Email: nasir.ahmed5@procserve.org
Payment: Invoice

Special instructions

Document history

- This RFQ has yet to be submitted

Submit to selected suppliers Save as Template Save as Draft Cancel Edit before sending





2.2.3.2.1 RFQ Templates

Overview

This sections shows how you can save your RFQ as template.

1. Create a new RFQ and go through all the step.
- 2 At Step 5, before you submit your RFQ to suppliers, click on 'Save as Template'

This RFQ will be sent to the following suppliers

	NAZ4TECH LTD Categories: Office Solutions LONDON, E17 8JQ Telephone number: +442073336162 Email: nasir.ahmed@procserve.com Payment: Invoice	
	NAZ LTD Categories: Office Solutions LONDON, E17 4SD Telephone number: +442073331623 Email: nasir.ahmed5@procserve.org Payment: Invoice	





Special instructions

Document history

- This RFQ has yet to be submitted

3. Scroll down to the bottom of the page and enter a suitable name for the RFQ template.

This RFQ will be sent to the following suppliers

	NAZ4TECH LTD Categories: Office Solutions LONDON, E17 8JQ Telephone number: +442073336162 Email: nasir.ahmed@procserve.com Payment: Invoice	
	NAZ LTD Categories: Office Solutions LONDON, E17 4SD Telephone number: +442073331623 Email: nasir.ahmed5@procserve.org Payment: Invoice	

Special instructions

Document history

- This RFQ has yet to be submitted

Template Name

4. Enter a suitable name and click on 'Save' button to save your RFQ template.

Create a new Request for Quote

[Start](#)
[Request for Quotation Templates](#)
[Draft Request for Quotations](#)

[Create a new Template](#)

Success! You have saved Pens_08.2012 Request for Quotation as a template

Name	Suppliers	Items	First Item	Date Saved	
Pens_08.2012	NAZ4TECH LTD, Demo Supplier	1	200.0 Black ink ball point pens	09 Aug 2012	Use Edit Delete
Text Books_08.2012	ProMatrix, NAZ LTD	1	200.0 Lined A4 ring bind text books	09 Aug 2012	Use Edit Delete

Showing 1 - 2 of 2 templates

If you need to use the template, click on 'Use' button, the RFQ process will restart from the beginning, where you can edit RFQ details, change add or remove suppliers and change delivery date.



In the list of saved templates, three buttons are displayed:

Use - This button allows to reuse the saved template and complete the process of submitting RFQ.

Edit - This buttons allows you to edit the template where you can add more lines and add or remove suppliers

Note: In the edit mode you will not be able to change the delivery and invoice address and you will not be able to set the delivery date.

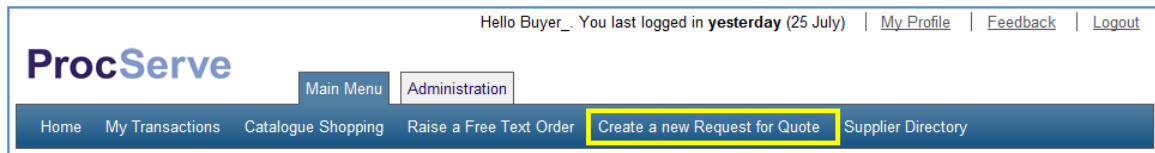
Delete - This allows you to delete the template from the list.

2.2.3.2.2 RFQ Saving as a Draft

Overview

This function will automatically save your RFQ as draft as you complete one step and move to the next. Purpose of this function is if a user has to stop the creating of RFQ at any point, the saved draft allows the user to continue from where it stopped instead of starting from the beginning again.

1. Start RFQ process by selecting 'Create a new Request for Quote'



2. Complete at least one step of RFQ by clicking on the 'Next Step' and then select 'Draft Request for Quotations tab.

You will be presented with list of Draft RFQs as below.

Create a new Request for Quote					
Start Request for Quotation Templates Draft Request for Quotations					
Name	Suppliers	Items	First Item	Date Saved	
AUTO DRAFT 1626		1	15.0 Pine finish desks with storage	10 Aug 2012	Edit Delete
Books_10.2012	NAZ4TECH LTD, NAZ LTD	1	300.0 Lined wire bound A4 note books	10 Aug 2012	Edit Delete
AUTO DRAFT 1624	NAZ4TECH LTD, NAZ LTD	1	300.0 Lined wire bound A4 note books	10 Aug 2012	Edit Delete
AUTO DRAFT 1623	ProMatrix, NAZ LTD	1	200.0 Black ink ball point pens	10 Aug 2012	Edit Delete
Showing 1 - 4 of 4 drafts					





Note: Draft will be saved at the point where you select the 'Next Step', as you can see from the above example, no supplier(s) name is populated, this is because the draft automatically saved where you stopped, in this instant, the process has not reached at step where the suppliers are selected.

You can save the RFQ as a draft and give name at any step.

3. Click on 'Save as Draft' button, then scroll down to bottom of the page and enter a suitable name and click on 'Save' button.

Creating a Request for Quote

This RFQ will be sent to the following suppliers





	ProMatrix Categories: Office Solutions London, SW1W 9SR Telephone number: +442073336161 Email: nasir_ahmed21@procserve.org Payment: Invoice	
	NAZ LTD Categories: Office Solutions LONDON, E17 4SD Telephone number: +442073331623 Email: nasir_ahmed5@procserve.org Payment: Invoice	

Special instructions

Document history

- This RFQ has yet to be submitted

This RFQ will be sent to the following suppliers

	NAZ4TECH LTD Categories: Office Solutions LONDON, E17 8JQ Telephone number: +442073336162 Email: nasir_ahmed@procserve.com Payment: Invoice	
	NAZ LTD Categories: Office Solutions LONDON, E17 4SD Telephone number: +442073331623 Email: nasir_ahmed5@procserve.org Payment: Invoice	

Special instructions

Document history

- This RFQ has yet to be submitted







Draft Name:

Now you will be presented with list of all saved list of draft RFQs.

Create a new Request for Quote

[Start](#) [Request for Quotation Templates](#) [Draft Request for Quotations](#)

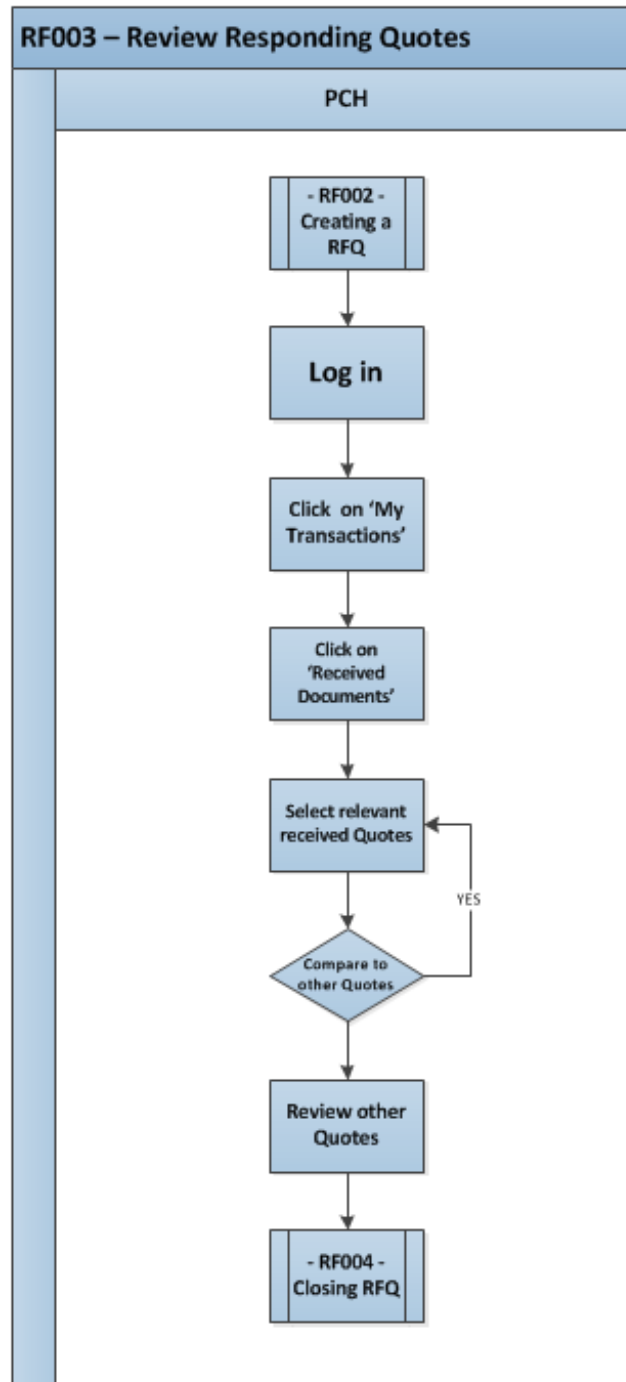
Success! You have saved Books_10.2012 as a draft

Name	Suppliers	Items	First Item	Date Saved	
Books_10.2012	NAZ4TECH LTD, NAZ LTD	1	300.0 Lined wire bound A4 note books	10 Aug 2012	 Edit  Delete
AUTO DRAFT 1624	NAZ4TECH LTD, NAZ LTD	1	300.0 Lined wire bound A4 note books	10 Aug 2012	 Edit  Delete
AUTO DRAFT 1623	ProMatrix, NAZ LTD	1	200.0 Black ink ball point pens	10 Aug 2012	 Edit  Delete
Showing 1 - 3 of 3 drafts					

2.2.3.3 Reviewing an RFQ

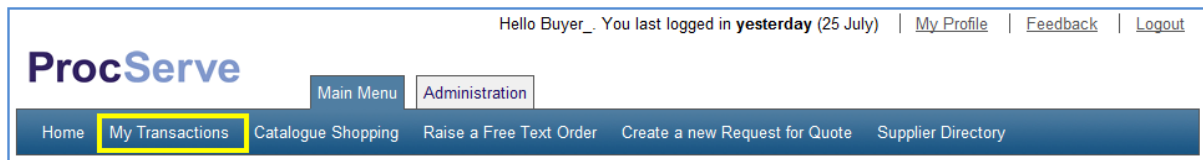
Overview

This section shows how you review the quotes you have received.

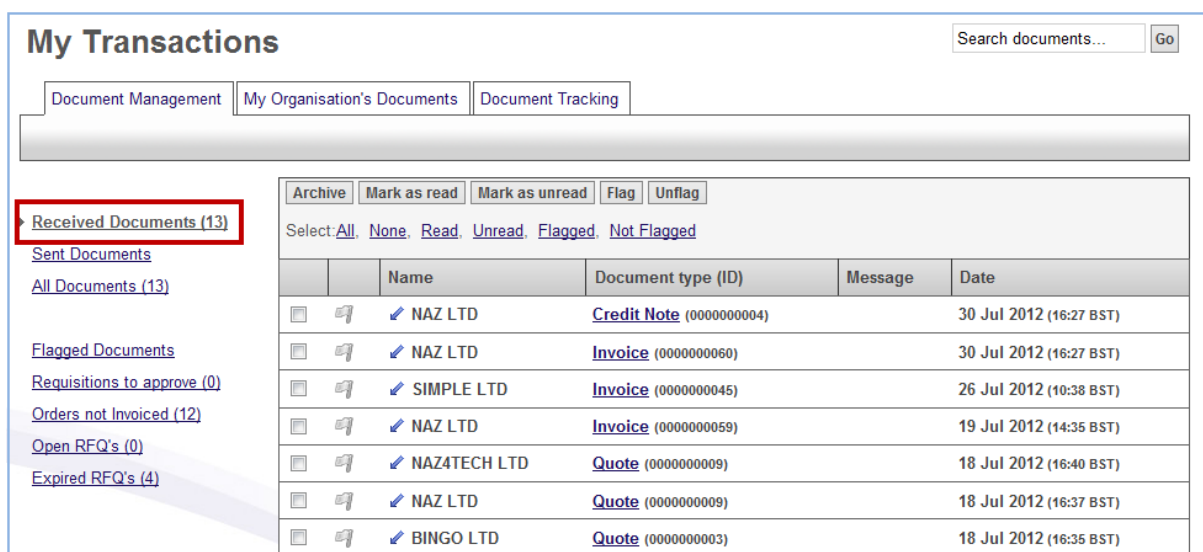


Reviewing received quotes

1. Log in to Procserve Commerce Hub.
2. Navigate to 'My Transactions',

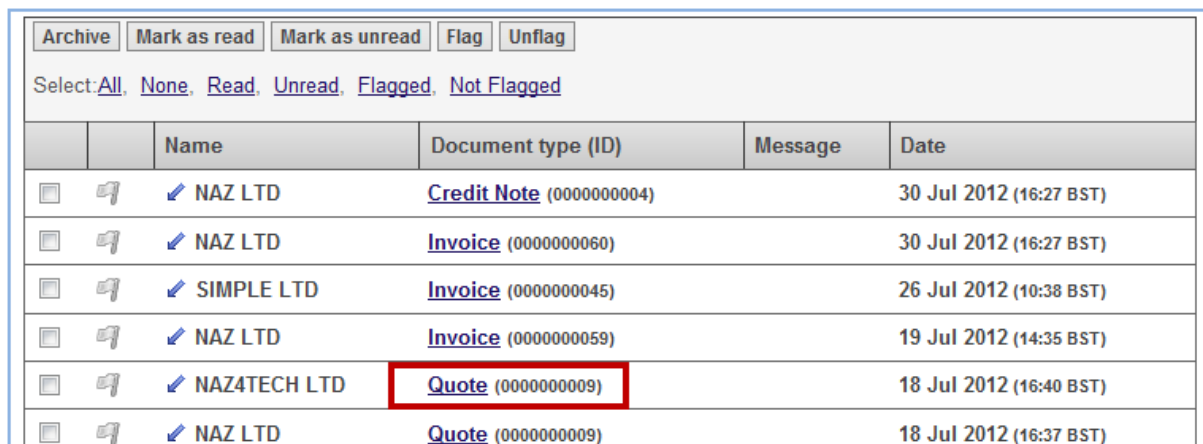


My Transaction page will be displayed, Received Documents will be populated by default, here you will be able to see all of the documents you have received including Invoice, Quotes and Credit Notes.



You should see all the transactions that you have received.

3. Click on a quote you have received



This will show the open quote and show all the other documents in the document tree which you can expand to review.

Creating a Request for Quote

Quote number 0000000003

Submission Date	15 Jul 2012 (13:12 BST)	From	NAZ4TECH LTD 32 THEOBALD ROAD LONDON E17 8JQ United Kingdom
Deliver to	SATURN LTD Admin_Nas SATURN LTD Hoe Street Walthamstow London E17 4SD United Kingdom		
Target delivery date	31 Jul 2012		

Item ID	Description	Quantity	Unit Price	Tax rate	Tax amount	Total price
Pens	Black in ball point pens	200 Each	£0.80	VAT 20%	£32.00	£192.00
Totals					£32.00	£192.00

Supplier comments

Document history

- You received Quote 0000000003 from NAZ4TECH LTD on the 15 Jul 2012
- Raised on the 15 Jul 2012

Tip! You can also review an RFQ by viewing the original RFQ at looking at the quotes at the footer of the document:

Quote evaluation

Quotes received	3
Average price	£204.80
Lowest price quotes	£192.00 - NAZ4TECH LTD £206.40 - NAZ LTD £216.00 - NAZ STORES LTD

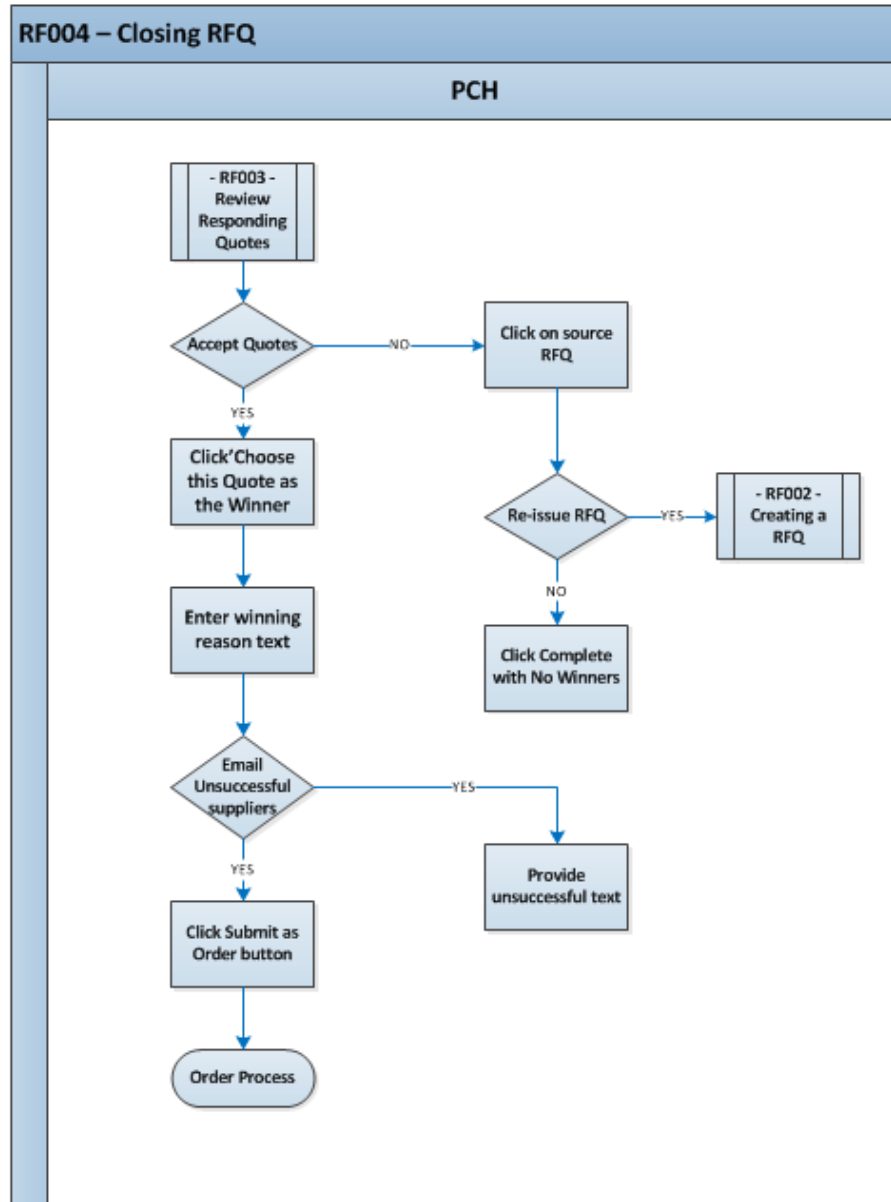
Quotes received ordered by total price with lowest first

Quote 0000000006 - NAZ4TECH LTD - Total price £192.00	☰
Quote 0000000031 - NAZ LTD - Total price £206.40	☰
Quote 0000000023 - NAZ STORES LTD - Total price £216.00	☰

2.2.3.4 Closing an RFQ

Overview

This section shows you how to close an RFQ.



Closing an RFQ

Having reviewed your quotes you can close your RFQ by choosing a winner or closing the RFQ with no winners.

Note: You can withdraw an RFQ before it has closed.

Awarding an RFQ

1. Locate the RFQ within 'My Transactions'

2. Select the winning quote from 'Received documents' in 'My Transactions'
3. Scroll to the bottom of the quote and click 'Choose this quote as the winner'

4. Provide a reason and click 'Choose as winner'

Choose as the winning quote

Please enter a reason for picking this quote as the winner. This reason will not appear on any Supplier facing documents, but will appear in the document history of this quote for future reference.

Reason	A good price
--------	--------------

You will be presented with 'Submit winning quote' page.

Submit winning quote

Step 1 - Check purchase order items

Item ID	Description	Quantity	Unit Price	Tax rate	Tax amount	Total price
Pens	Pens	200 Each	£0.70	VAT 20%	£28.00	£168.00
Totals					£28.00	£168.00

Step 2 - Confirm delivery and invoicing details

Step 3 - Add payment details

Step 4 - Confirm details and send requisition

Tip! You can convert your winning quote to an order by clicking 'Submit as order' at the footer of the winning quote.

Closing an RFQ with no winners

1. Locate the RFQ within 'My Transactions'
2. Scroll to the footer of the RFQ and click 'Complete with no winners'

3. Give a reason why you closed the RFQ with no winners and click 'Complete this RFQ'

Creating a Request for Quote

Complete with no winner

Please enter a reason for not choosing any of the quotes received against this RFQ. Your reason will be recorded for future reference in this RFQs document history.

Reason	All quotes above target price.
<input type="button" value="Complete this RFQ"/>	<input type="button" value="Cancel"/>

You should be presented with a success message.

Withdrawing an RFQ

1. Locate the RFQ within 'My Transactions'
2. Scroll to the footer of the RFQ and click 'Withdraw this RFQ'

<input type="button" value="Add a supplier"/>	<input type="button" value="Reissue this RFQ"/>	<input type="button" value="Withdraw this RFQ"/>	<input type="button" value="Forward"/>	<input type="button" value="Save as PDF"/>	<input type="button" value="Save as a cXML file"/>
---	---	--	--	--	--

3. Give a reason why the RFQ is being withdrawn

Reason for withdraw	RFQ submitted to wrong suppliers
<input type="button" value="Confirm withdrawal"/>	<input type="button" value="Cancel"/>

You will receive on screen confirmation that the RFQ has been withdrawn and the suppliers will be automatically informed.

Hello Buyer_ You last logged in today (27 July)
| [My Profile](#)
| [Feedback](#)
| [Logout](#)

ProcServe
Main Menu Administration

Home My Transactions Catalogue Shopping Raise a Free Text Order Create a new Request for Quote Supplier Directory

My Transactions
Document Management My Organisation's Documents Document Tracking

This RFQ has been withdrawn. The suppliers concerned have been informed.

RFQ number 2428

Creation date	27 Jul 2012 (12:26 BST)	Invoice to	SATURN LTD Buyer_ Administrator Hoe Street Walthamstow London E17 4SD United Kingdom
Deliver to	SATURN LTD Buyer_ Administrator Hoe Street Walthamstow London		

2.2.4 Supplier Directory

2.2.4.1 Introduction to the Supplier Directory

Overview

Supplier Directory allows you to view all suppliers registered on the Procserve Trading Network who are available in your marketplace.

Note: If you can not see 'Supplier Directory' you may not have the required role. Please check with your system administrator.

Supplier Capabilities

There are up to seven Supplier Capability icons associated with each supplier depending upon the suppliers current status.

These capabilities reflect the supplier registration status, their system integration capabilities, multi-buyer status and environmental certification.

The seven Supplier Capability icons are as follows:



Supplier has been pre-registered but have yet to complete the registration process. They are able to receive PO via email but do not have access to the Procserve Commerce Network.



Supplier has completed registration and has full access to the Procserve Commerce Network.



A supplier that currently delivers one or more catalogues to one or more buyers.



A supplier that has submitted at least one quote to an RFQ.



A supplier that has submitted one or more electronic invoices to one or more buyers.



A supplier who is back-end integrated using the Procserve Commerce Network.



Environmentally Certified.

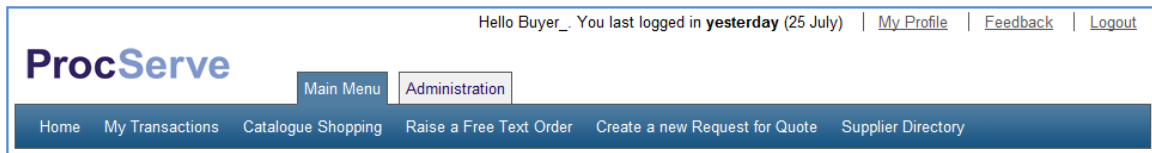
2.2.4.2 Viewing Suppliers my Organisation has traded with

Overview

'Suppliers my Organisation has traded with' shows all the organisations that you have sent an order or a Request for Quote to or have received an Invoice, Quote or Credit Note from.

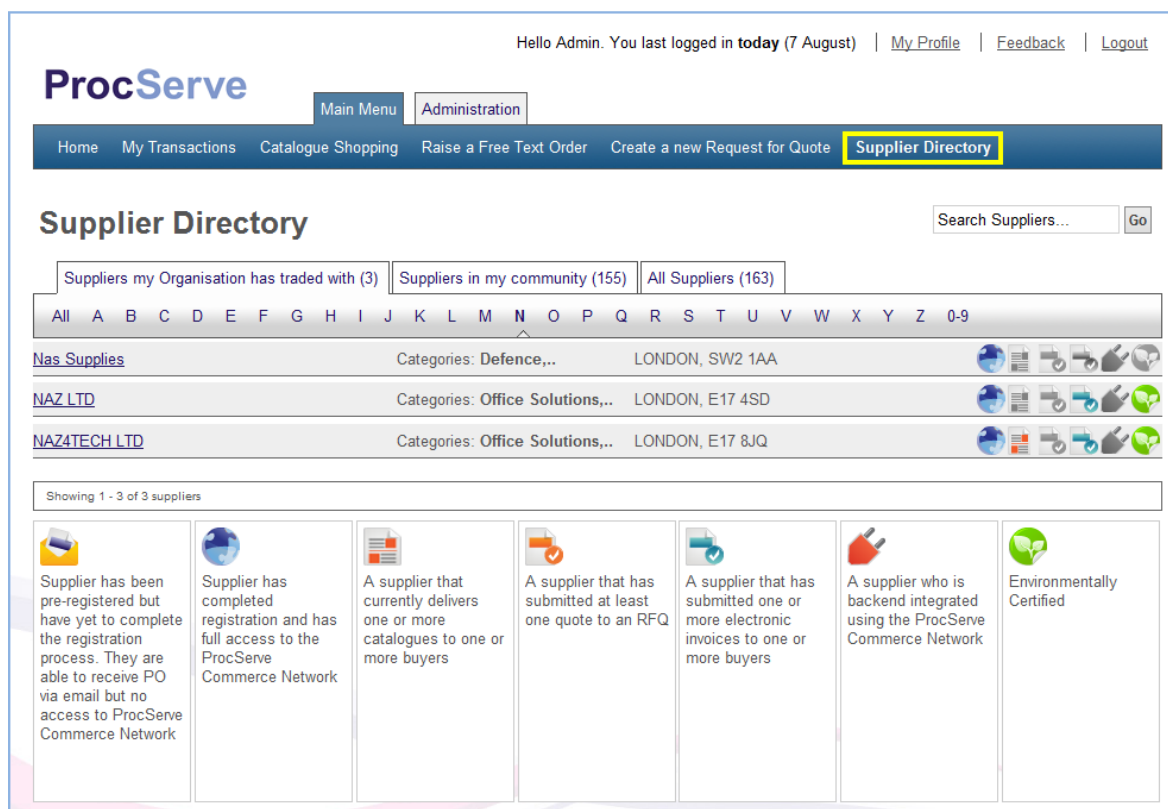
Using 'Supplier my Organisation has traded with'

1. Click on the 'Main Menu' tab within Procserve Commerce Hub



2. Click on the 'Supplier Directory'

From here you can view the suppliers by their name using the alpha numeric list [1] and search for a supplier [2].



2.2.4.3 Viewing All Available Suppliers in the Community

Overview

'All available suppliers' shows all the organisations that are on the Procserve Trading Network and available in your marketplace.

Using 'All available suppliers'

1. Click on the 'Main Menu' tab within Procserve Commerce Hub
2. Click on the 'Supplier Directory' tab
3. Click on the 'All suppliers' tab

From here you can view the suppliers by their name using the alpha numeric list [1] and search for a supplier [2]

Note: You can search the Supplier Directory by suppliers name, category, DUNS number, contact details or description.

ProcServe

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Main Menu Administration


























Home My Transactions Catalogue Shopping Raise a Free Text Order Create a new Request for Quote **Supplier Directory**

Supplier Directory

Search Suppliers...

Suppliers my Organisation has traded with (12) Suppliers in my community (155) **All Suppliers (163)**

All A B C D E F G H I J K L M N O P Q R S T U V W X Y Z 0-9

✓	3663 LTD	Categories:	HIGH WYCOMBE, HP11 1JU	    
✓	A.B.C	Categories:	LONDON, W2 5SH	    
✓	A COMPANY LTD	Categories:	LONDON, NW6 1NX	    
✓	Abc	Categories:	LONDON, E17 8LS	    
✓	ANG LTD	Categories:	Office Solutions,.. BATH, BA1 3PB	    

2.2.5 Transactions Created in Procserve Commerce Hub

2.2.5.1 Introduction to My Transactions

Overview

My Transactions captures your own and your organisations transactions. From within My Transactions you can perform any approvals that may be required on specific document types. You can also view inbound documents and documents you have created. These could include:

- Purchase Requisitions
- Purchase Orders
- Request for Quotes
- Quotes
- Invoices
- Credit Notes

Note: What you see in My Transactions depends on the Roles that you have been assigned.

2.2.5.2 Received Documents

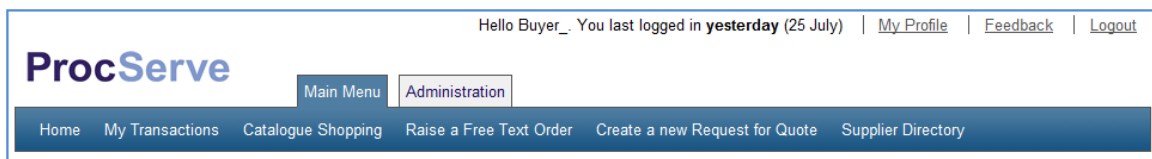
Overview

Received documents are documents that have been created by someone else but made available to you to view or action. You can see the transactions you have received in 'My Transactions'. You may also be able to see all the organisations transactions if you have the required roles.

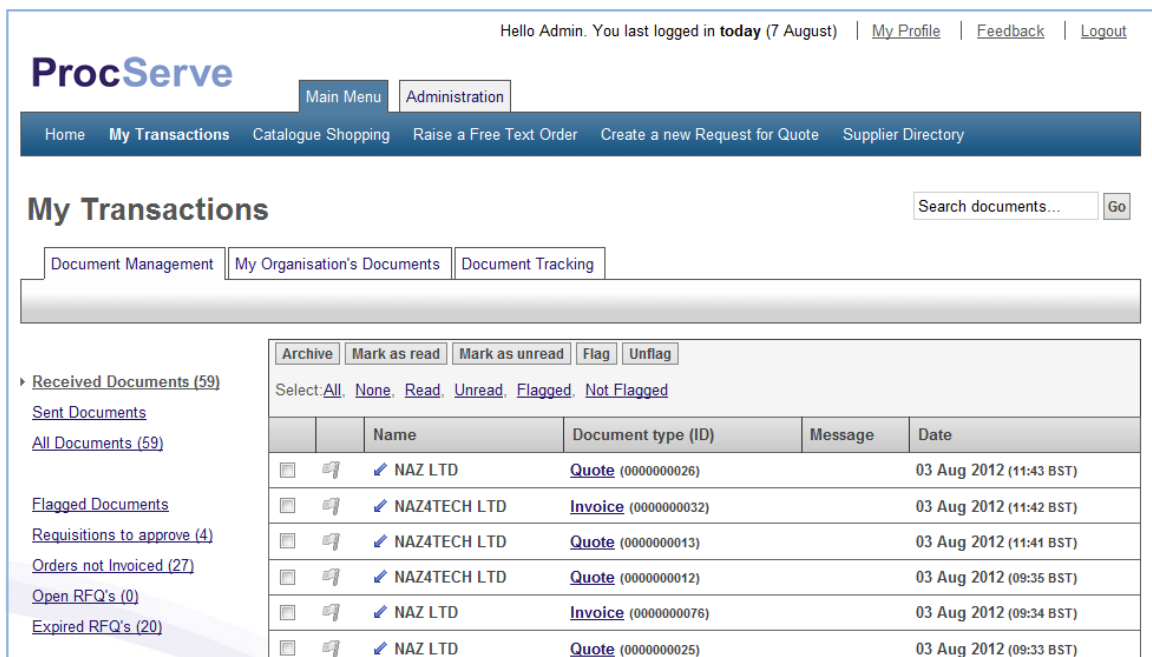
If a document, such as an invoice, quote or credit note, has been submitted then the relevant user will receive an email informing them of the document.

To view Received Documents

1. Click on the 'Main Menu' tab within Procserve Commerce Hub



2. Click on 'My Transactions'



You will be taken the the 'My Transactions' page where you can navigate if required to 'Received documents'

Note: Dependant on your role, you may be able to view transactions across your organisation. You may, as a result, be provided with a further menu filter - 'Show my transactions only' and 'Show all transactions for my organisation'.

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ProcServe

[Main Menu](#) [Administration](#)

[Home](#) [My Transactions](#) [Catalogue Shopping](#) [Raise a Free Text Order](#) [Create a new Request for Quote](#) [Supplier Directory](#)

My Transactions

[Document Management](#) [My Organisation's Documents](#) [Document Tracking](#)

[Received Documents \(59\)](#)
[Sent Documents](#)
[All Documents \(59\)](#)

[Flagged Documents](#)
[Requisitions to approve \(4\)](#)
[Orders not Invoiced \(27\)](#)
[Open RFQ's \(0\)](#)
[Expired RFQ's \(20\)](#)

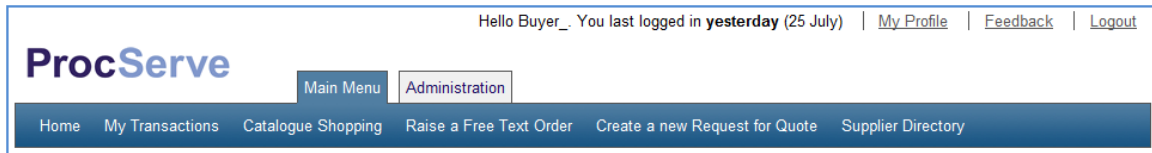
Archive Mark as read Mark as unread Flag Unflag Select: All , None , Read , Unread , Flagged , Not Flagged					
		Name	Document type (ID)	Message	Date
<input type="checkbox"/>		NAZ LTD	Quote (0000000026)		03 Aug 2012 (11:43 BST)
<input type="checkbox"/>		NAZ4TECH LTD	Invoice (0000000032)		03 Aug 2012 (11:42 BST)
<input type="checkbox"/>		NAZ4TECH LTD	Quote (0000000013)		03 Aug 2012 (11:41 BST)
<input type="checkbox"/>		NAZ4TECH LTD	Quote (0000000012)		03 Aug 2012 (09:35 BST)
<input type="checkbox"/>		NAZ LTD	Invoice (0000000076)		03 Aug 2012 (09:34 BST)
<input type="checkbox"/>		NAZ LTD	Quote (0000000025)		03 Aug 2012 (09:33 BST)

2.2.5.3 Transactions that have been Sent

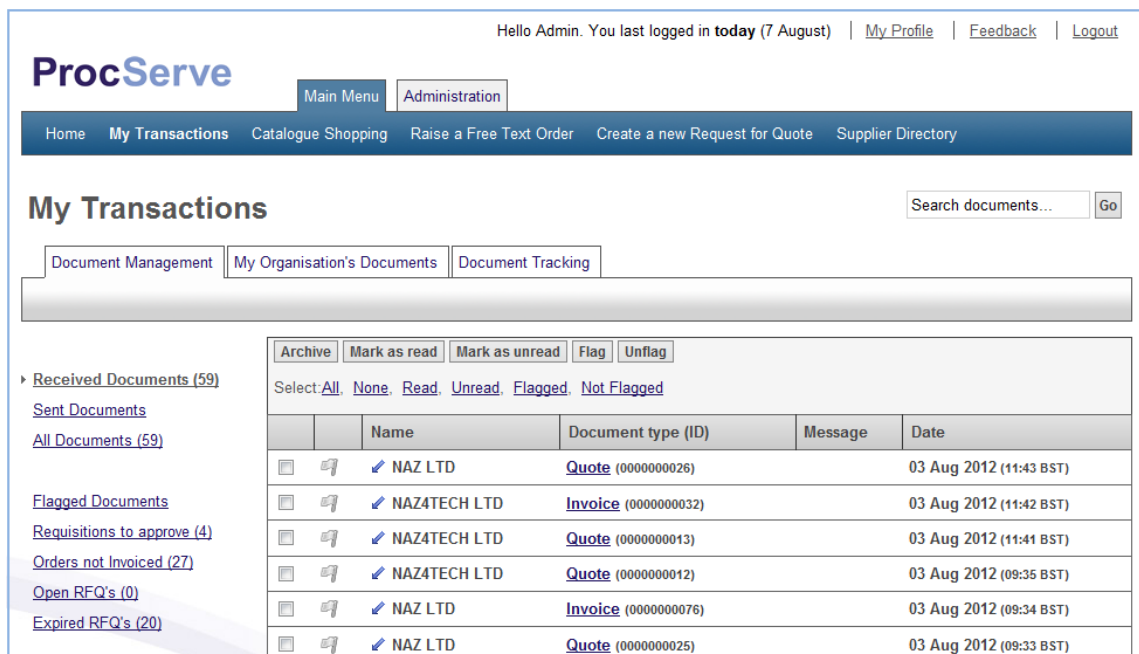
Overview

You can see the transactions you have sent in 'My Transactions'. You may also be able to see all the organisations transactions if you have the required roles.

1. Click on the 'Main Menu' tab within Procserve Commerce Hub



2. Click on 'My Transactions'



You will be taken the the 'My Transactions' page where you can navigate if required to 'Sent documents'.

Note: Dependant on your role, you may be able to view transactions across your organisation. You may, as a result, be provided with a further menu filter - 'Show my transactions only' and 'Show all transactions for my organisation'.

Transactions Created in Procserve Commerce Hub

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ProcServe

[Main Menu](#) [Administration](#)

[Home](#) [My Transactions](#) [Catalogue Shopping](#) [Raise a Free Text Order](#) [Create a new Request for Quote](#) [Supplier Directory](#)

My Transactions

[Document Management](#) [My Organisation's Documents](#) [Document Tracking](#)

[Received Documents \(3\)](#)
▶ [Sent Documents](#)
[All Documents \(3\)](#)

[Flagged Documents](#)
[Requisitions to approve \(0\)](#)
[Orders not Invoiced \(1\)](#)
[Open RFQ's \(0\)](#)
[Expired RFQ's \(2\)](#)

[Archive](#) [Mark as read](#) [Mark as unread](#) [Flag](#) [Unflag](#)

Select: [All](#), [None](#), [Read](#), [Unread](#), [Flagged](#), [Not Flagged](#)

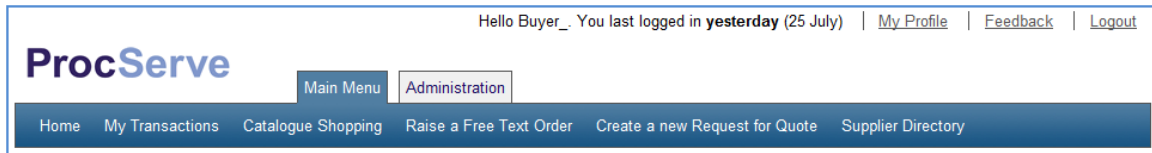
	Name	Document type (ID)	Message	Date
<input type="checkbox"/>	Super_Nas	Requisition (2459)	Approved	07 Aug 2012 (12:09 BST)
<input type="checkbox"/>	Admin_Nas	Requisition (2457)	200.0 Black ink ball point pens	07 Aug 2012 (11:12 BST)
<input type="checkbox"/>	Admin_Nas	Requisition (2442)	Approved	31 Jul 2012 (12:24 BST)
<input type="checkbox"/>	Admin_Nas	Requisition (2433)	Approved	27 Jul 2012 (20:19 BST)
<input type="checkbox"/>				27 Jul 2012 (20:19 BST)

2.2.5.4 Retrieving Archived Documents

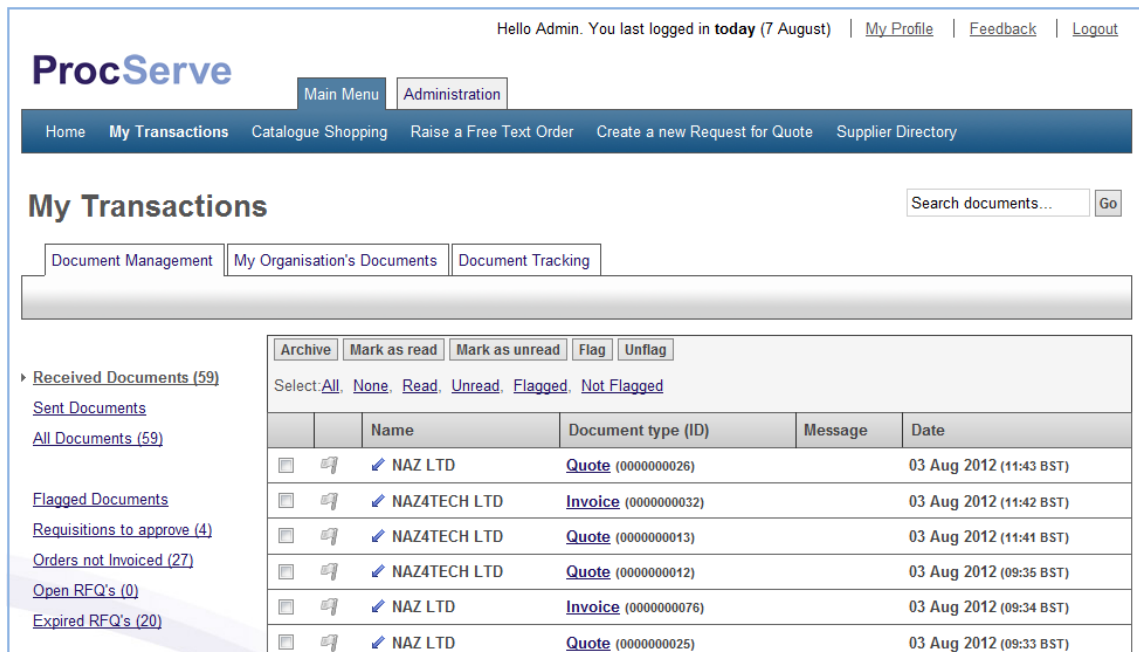
Overview

You can see the transactions that have been archived in 'My Transactions'. You may also be able to see all the organisations transactions if you have the required roles.

1. Click on the 'Main Menu' tab within Procserve Commerce Hub



2. Click on 'My Transactions'



You will be taken the the 'My Transactions' page

3. Click 'All Documents' to view all documents including those that have been archived.

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ProcServe [Main Menu](#) [Administration](#)

[Home](#) [My Transactions](#) [Catalogue Shopping](#) [Raise a Free Text Order](#) [Create a new Request for Quote](#) [Supplier Directory](#)

My Transactions

[Document Management](#) [My Organisation's Documents](#) [Document Tracking](#)

[Received Documents \(59\)](#)
[Sent Documents](#)
▶ All Documents (59)
[Flagged Documents](#)
[Requisitions to approve \(4\)](#)
[Orders not Invoiced \(27\)](#)
[Open RFQ's \(0\)](#)
[Expired RFQ's \(20\)](#)

Select: [All](#), [None](#), [Read](#), [Unread](#), [Flagged](#), [Not Flagged](#)

	Name	Document type (ID)	Message	Date
<input type="checkbox"/>	NAZ LTD	Purchase Order (1584)	100.0 Tests	06 Aug 2012 (09:08 BST)
<input type="checkbox"/>	NAZ LTD	Quote (0000000026)		03 Aug 2012 (11:43 BST)
<input type="checkbox"/>	NAZ4TECH LTD	Invoice (0000000032)		03 Aug 2012 (11:42 BST)
<input type="checkbox"/>	NAZ4TECH LTD	Quote (0000000013)		03 Aug 2012 (11:41 BST)
<input type="checkbox"/>	NAZ4TECH LTD, NAZ LTD	Request For Quotation (1575)	200.0 Test	03 Aug 2012 (11:40 BST)

Archiving documents

1. Click the tick box next to a transaction. **Note:** You select multiple transactions.
2. Click the 'Archive' button

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ProcServe [Main Menu](#) [Administration](#)

[Home](#) [My Transactions](#) [Catalogue Shopping](#) [Raise a Free Text Order](#) [Create a new Request for Quote](#) [Supplier Directory](#)

My Transactions

[Document Management](#) [My Organisation's Documents](#) [Document Tracking](#)

[Received Documents \(59\)](#)
[Sent Documents](#)
▶ All Documents (59)
[Flagged Documents](#)
[Requisitions to approve \(4\)](#)
[Orders not Invoiced \(27\)](#)
[Open RFQ's \(0\)](#)
[Expired RFQ's \(20\)](#)

Select: [All](#), [None](#), [Read](#), [Unread](#), [Flagged](#), [Not Flagged](#)

	Name	Document type (ID)	Message	Date
<input type="checkbox"/>	NAZ LTD	Purchase Order (1584)	100.0 Tests	06 Aug 2012 (09:08 BST)
<input type="checkbox"/>	NAZ LTD	Quote (0000000026)		03 Aug 2012 (11:43 BST)
<input type="checkbox"/>	NAZ4TECH LTD	Invoice (0000000032)		03 Aug 2012 (11:42 BST)
<input type="checkbox"/>	NAZ4TECH LTD	Quote (0000000013)		03 Aug 2012 (11:41 BST)
<input type="checkbox"/>	NAZ4TECH LTD, NAZ LTD	Request For Quotation (1575)	200.0 Test	03 Aug 2012 (11:40 BST)

Your documents will be moved to the archive.

2.3 Procserve Commerce Hub Administration

2.3.1 Overview

Administration Menu Options

Note: Dependant on your organisation set up and roles you have been given, you may not have access to some of the menu options.

1] Community Management - Within Community Management you can edit the helpdesk contact details, organisations and catalogue content and views.

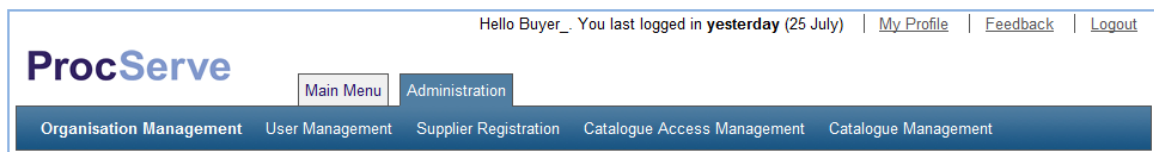
2] Organisation Management - You can view and edit the the general address details of your organisation in 'Organisation Management'.

3] User Management - You can add, edit and deactivate users within your organisation in 'User Management'

4] Supplier Registration - You can manage your supplier adoption in 'Supplier Registration'

5] Catalogue Access Management - You can determine which organisations and users can see what content in 'Catalogue Access Management'

6] Catalogue Management - You can upload and manage your catalogue content in 'Catalogue Management'



2.3.2 Managing your Supplier Adoption

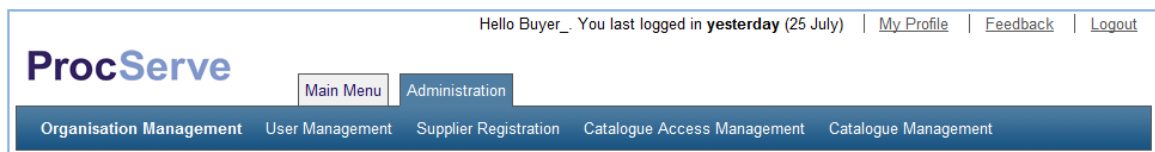
2.3.2.1 Overview of Supplier Registration

Overview

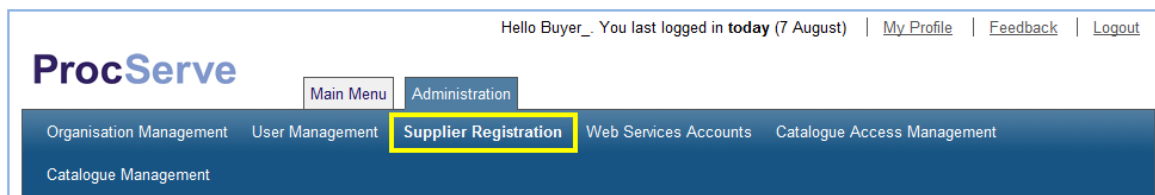
This section describes how you can add new suppliers to the Procserve Trading Network. By loading a suppliers details they will automatically be added as a basic supplier. This section looks at both the loading process and the tools to progress supplier registration.

Supplier Registration

1. Click on the 'Administration' tab



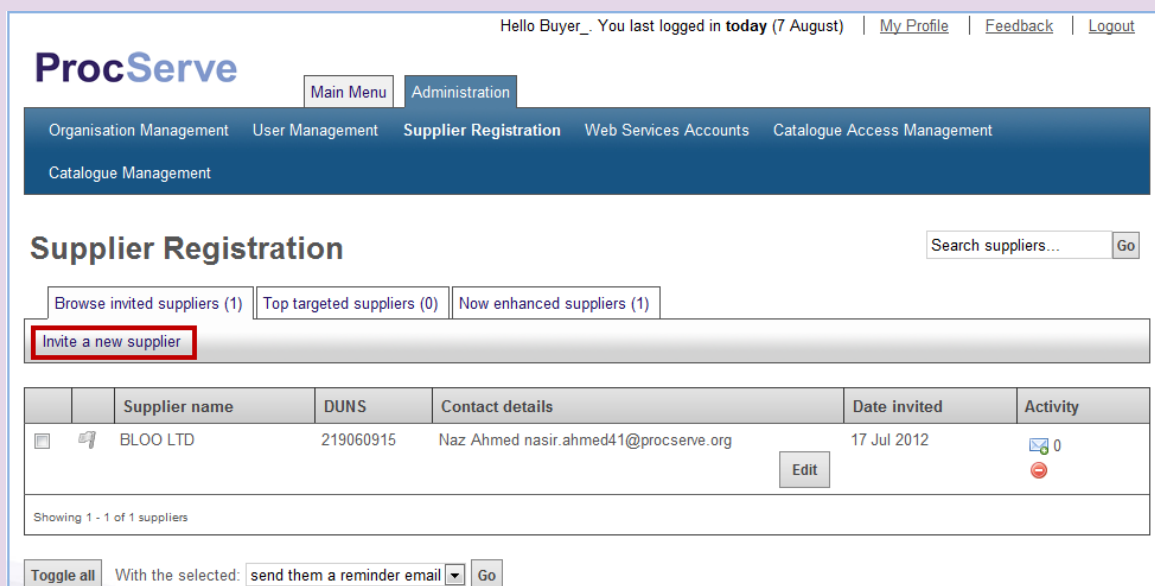
2. Click 'Supplier Registration'



From here you can see the three tabs used in Supplier Registration

Tip! Adding new suppliers

You can invite new suppliers to join the Procserve Trading Network. For more information on this view the 'Registering New Suppliers'.



Browse invited suppliers

Managing your Supplier Adoption

You can search all the suppliers you have added and have not yet registered. You can also remind selected suppliers to complete registration.

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ProcServe

[Main Menu](#) [Administration](#)

Organisation Management User Management **Supplier Registration** Web Services Accounts Catalogue Access Management











Catalogue Management

Supplier Registration

Search suppliers...

[Browse invited suppliers \(5\)](#) [Top targeted suppliers \(1\)](#) [Now enhanced suppliers \(6\)](#)

[Invite a new supplier](#)

	Supplier name	DUNS	Contact details	Date invited	Activity
	COMPAY LTD	458973823	A Company nasir.ahmed58@procserve.org <input type="button" value="Edit"/>	01 Aug 2012	 0
	QUICK LTD	846911951	Nas Ahmed nasir.ahmed7@procserve.org <input type="button" value="Edit"/>	15 May 2012	 0
	Nasir	230481053	Nasir Ahmed nasir.ahmed21@procserve.com <input type="button" value="Edit"/>	29 Nov 2011	 0
	SCIMITAR DIVING LTD	233878078	Nasir Ahmed nasir.ahmed3@procserve.org <input type="button" value="Edit"/>	21 Nov 2011	 0
	SCIMITAR CAPITAL LTD	211778393	Nasir Ahmed nasir.ahmed2@procserve.org <input type="button" value="Edit"/>	21 Nov 2011	 0

Showing 1 - 5 of 5 suppliers

Top targeted suppliers

You can add suppliers to 'Top targeted suppliers' to ensure that you focus effort on adopting these. See the 'Targeting your Suppliers' for more information.

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ProcServe

[Main Menu](#) [Administration](#)

Organisation Management User Management **Supplier Registration** Web Services Accounts Catalogue Access Management



Catalogue Management

Supplier Registration

Search top targets...

[Browse invited suppliers \(5\)](#) [Top targeted suppliers \(1\)](#) [Now enhanced suppliers \(6\)](#)

[Invite a new supplier](#)

	Supplier name	DUNS	Contact details	Date invited	Activity
	SCIMITAR CAPITAL LTD	211778393	Nasir Ahmed nasir.ahmed2@procserve.org <input type="button" value="Edit"/>	21 Nov 2011	 0

Showing 1 - 1 of 1 suppliers

With the selected:

Now enhanced suppliers

You can view the suppliers you have invited that have registered on the Procserve Trading Network and the status they have achieved. There are three types of enhanced suppliers: Bronze, supplier has agreed the terms and conditions and now has access to the Supplier Portal; Silver, as Bronze and the supplier has provided content; Gold, as silver and the supplier has some form of back office integration.

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ProcServe

[Main Menu](#) [Administration](#)

[Organisation Management](#) [User Management](#) [Supplier Registration](#) [Web Services Accounts](#) [Catalogue Access Management](#)

[Catalogue Management](#)

Supplier Registration

[Browse invited suppliers \(5\)](#) [Top targeted suppliers \(1\)](#) [Now enhanced suppliers \(6\)](#)

[Invite a new supplier](#)

Capabilities	Supplier name and DUNS Number	Contact details	Date invited	Registered date
	GERMAN LTD 734120640	Nas Ahmed nasir.ahmed4@procserve.org	14 May 2012	14 May 2012
	MICROTRONICS LTD 494977804	Nasir Ahmed naz4tech@gmail.com	09 Dec 2011	09 Dec 2011
	MICROTRONICS LTD 216572988	Nasir Ahmed nasir.ahmed@procserve.com	24 Nov 2011	29 Nov 2011
	MICROTRONICS LTD 290699487	Nasir Ahmed nasir.ahmed18@procserve.org	25 Nov 2011	25 Nov 2011
	PURPLE TURTLE DIVING LTD 217255969	Toni Griffiths toni.griffiths11@procserve.org	24 Nov 2011	24 Nov 2011
	A COMPANY LTD 399462621	Non Paying nasir.ahmed59@procserve.org	01 Aug 2012	

Showing 1 - 6 of 6 suppliers

2.3.2.2 Registering New Suppliers

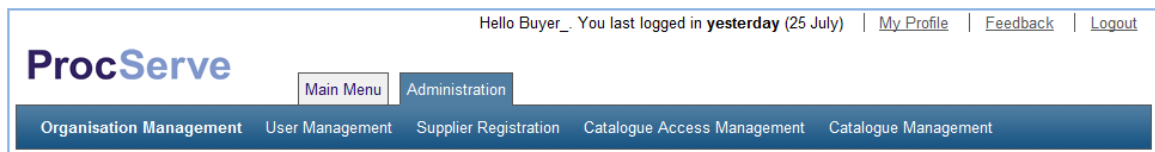
Overview

Dependant on your role, you can invite and add new suppliers for yours and on behalf of other organisations using Supplier Registration.

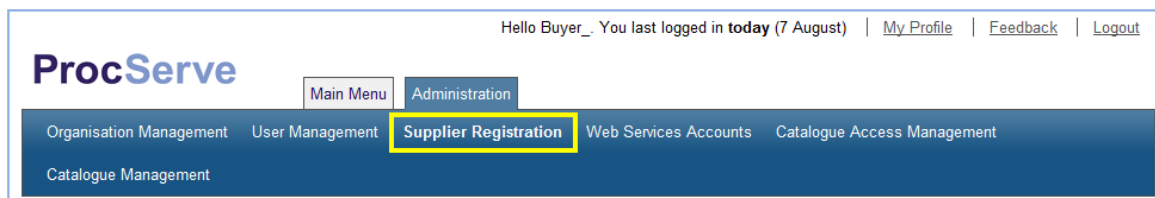
Note: Dependant on your community and organisation setup some of the screens and steps may appear differently.

To add a new Supplier to the marketplace

1. Click on the 'Administration' tab

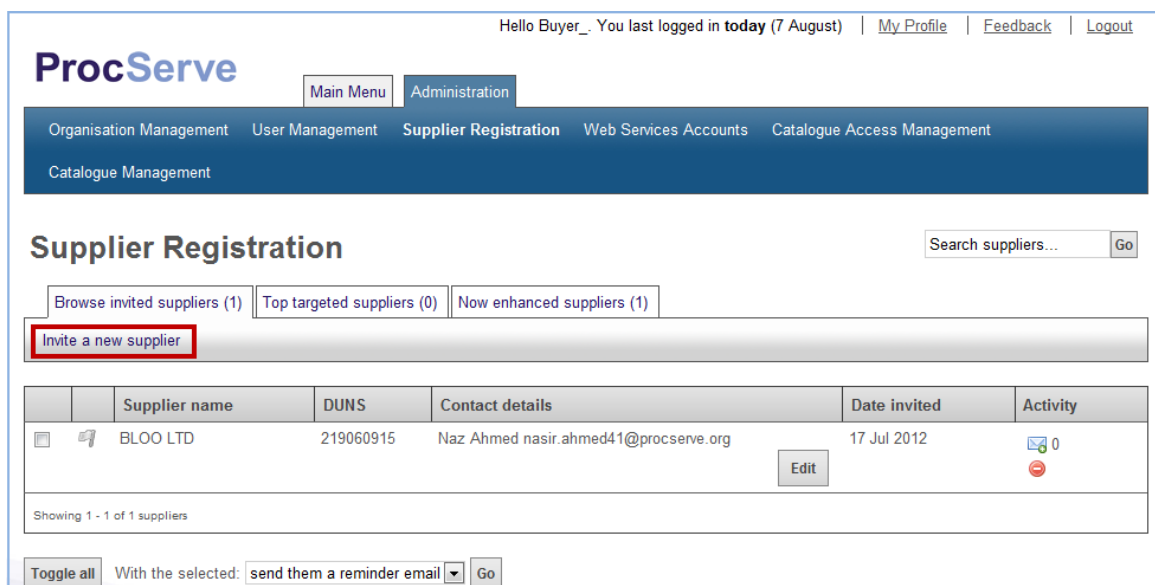


2. Click 'Supplier Registration'



From here you will see all suppliers that you have invited and are currently in the registration process.

3. Click 'Invite a new supplier'



NOTE: Steps 4 and 5 only apply for the Community Administrator.

4. Search for the buying organisation you wish to register the supplier for.

Hello Nasir. You last logged in **yesterday** (6 August) | [My Profile](#) | [Feedback](#) | [Logout](#)

ProcServe

[Main Menu](#) [Administration](#)

[Root Management](#) [Network Management](#) [Community Management](#) [Community Registration](#) [Organisation Management](#) [User Management](#)

[Supplier Registration](#) [Buyer Registration](#) [Catalogue Access Management](#) [Catalogue Management](#)

Supplier Registration

[Browse invited suppliers \(41\)](#) [Top targeted suppliers \(3\)](#) [Now enhanced suppliers \(58\)](#)

[Invite a new supplier](#)

Step 1 - Choose which Organisation you are inviting this supplier on behalf of

Which organisation would you like to invite this supplier for? *

Jupiter

[Search organisations](#)

Step 2 - Find the supplier

Step 3 - Add contact details for the supplier

5. Choose the buying organisation you are inviting the supplier on behalf of and click 'Invite supplier for this organisation'

Supplier Registration

[Browse invited suppliers \(41\)](#) [Top targeted suppliers \(3\)](#) [Now enhanced suppliers \(58\)](#)

[Invite a new supplier](#)

Step 1 - Choose which Organisation you are inviting this supplier on behalf of

Which organisation would you like to invite this supplier for? *

Jupiter

[Search organisations](#)

Search Results (2)

Organisation name	DUNS Number	Marketplace(s)	Address details	
Jupiter Buyer Ltd	987896541	Zanzibar	123 Buckingham Palace Road London SW1W 9SR	Invite supplier for this organisation
Ang Jupiter Ltd	989765431	Zanzibar	Walthamstow London E17	Invite supplier for this organisation

Showing 1 - 2 of 2 results

Step 2 - Find the supplier

Step 3 - Add contact details for the supplier

6. Fill in the web form to search for the details of the supplier

Managing your Supplier Adoption

Step 2 - Find the supplier

Supplier name *	<input type="text"/>
Address	<input type="text"/>
City / Town *	<input type="text"/>
County	<input type="text"/>
Country	United Kingdom ▼
Post Code	<input type="text"/>

Find this supplier

Step 3 - Add contact details for the supplier

7. When complete click 'Find this supplier'

Your results will be shown at the bottom of the page.

8. Click 'Invite this supplier' to select your chosen supplier

Search Results (10)					
Result relevance	Registered name	Trading name	DUNS Number	Address details	
80%	Atlas Property Letting Services		210340911	4 South Ealing Road LONDON W5 4QA	Invite this supplier
80%	ATLAS DEPOSITS LTD		216733129	4 South Ealing Road LONDON W5 4QA	Invite this supplier
80%	ATLAS PROPERTY LETTING & SERVICES LTD		769996786	4 South Ealing Road LONDON W5 4QA	Invite this supplier
50%	The Atlas		213453967	16 Seagrave Road LONDON SW6 1RX	Invite this supplier

9. Add the contact details for the supplier and click 'Invite this supplier'

Step 3 - Add contact details for the supplier

Supplier name	The Atlas
DUNS Number	213453967
Address	16 Seagrave Road
City / Town	LONDON
County	
Country	GB
	SW6 1RX

Add contact details for this supplier

Contact name *	<input type="text"/>
Email address *	<input type="text"/>
Order email address	<input type="text"/>

Invite this supplier

You should then get a success message.









Supplier Registration

Search suppliers...

[Browse invited suppliers \(42\)](#) [Top targeted suppliers \(3\)](#) [Now enhanced suppliers \(58\)](#)

[Invite a new supplier](#)

Success! You have successfully invited The Atlas. To add them to your Top targeted suppliers list click on the grey flag next to their name below.

	Supplier name	DUNS	Contact details	Originally invited by	Date invited	Activity
<input type="checkbox"/>	 The Atlas	213453967	Atlas Man nasir.ahmed60@procserve.org <input type="button" value="Edit"/>	Jupiter Buyer Ltd	07 Aug 2012	 1  0 
<input type="checkbox"/>	 COMPAY LTD	458973823	A Company nasir.ahmed58@procserve.org <input type="button" value="Edit"/>	Jupiter Buyer Ltd	01 Aug 2012	 1  0 

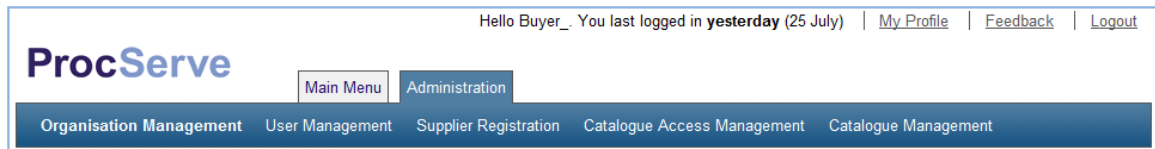
2.3.2.3 Reminding Suppliers to Join

Overview

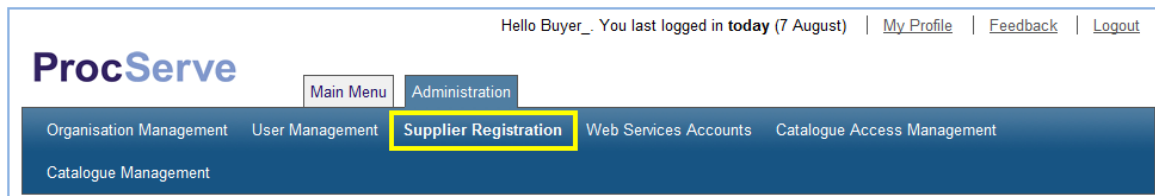
Once a supplier has been invited to join the Procserve Trading Network you can remind them to complete their registration.

Sending reminders to suppliers

1. Click on the 'Administration' tab



2. Click 'Supplier Registration'



From here you will see all suppliers that you have invited and are currently in the registration process.

Tip! To focus your supplier adoption - use the top targeted tab and invite suppliers from there as a priority.

3. Tick the box next the supplier you wish to remind and then at the footer of the page click 'Go'

Tip! More than one supplier can be reminded at a time by selecting multiple boxes.

Supplier Registration

	Supplier name	DUNS	Contact details	Date invited	Activity
<input checked="" type="checkbox"/>	The Atlas	213453967	Atlas Man nasir.ahmed60@procserve.org <input type="button" value="Edit"/>	07 Aug 2012	0
<input checked="" type="checkbox"/>	COMPAY LTD	458973823	A Company nasir.ahmed58@procserve.org <input type="button" value="Edit"/>	01 Aug 2012	0
<input checked="" type="checkbox"/>	QUICK LTD	846911951	Nas Ahmed nasir.ahmed7@procserve.org <input type="button" value="Edit"/>	15 May 2012	0
<input type="checkbox"/>	Nasir	230481053	Nasir Ahmed nasir.ahmed21@procserve.com <input type="button" value="Edit"/>	29 Nov 2011	0
<input checked="" type="checkbox"/>	SCIMITAR DIVING LTD	233878078	Nasir Ahmed nasir.ahmed3@procserve.org <input type="button" value="Edit"/>	21 Nov 2011	0
<input type="checkbox"/>	SCIMITAR CAPITAL LTD	211778393	Nasir Ahmed nasir.ahmed2@procserve.org <input type="button" value="Edit"/>	21 Nov 2011	0

Showing 1 - 6 of 6 suppliers

With the selected

You will then be presented with the email wizard for sending a reminder email.

Supplier Registration

[Browse invited suppliers \(6\)](#)
[Top targeted suppliers \(1\)](#)
[Now enhanced suppliers \(6\)](#)

This email will be sent from portal@procserve.com any replies will be directed to your email address (nasir.ahmed@procserve.com). The suppliers will be blind copied in to this message, and will therefore not be able to see who else you have sent this to.

To:	nasir.ahmed58@procserve.org, nasir.ahmed3@procserve.org, nasir.ahmed60@procserve.org, nasir.ahmed7@procserve.org
Subject: *	A reminder from Jupiter Buyer Ltd

We recently invited you join the ProcServe Trading Network. I notice that you haven't yet registered.

The ProcServe Trading Network is Jupiter Buyer Ltd's preferred method of sending orders to our suppliers and all our orders will be sent to you via the ProcServe Trading Network.

We would like you to join the ProcServe Trading Network so you can provide content for our buyers and return invoices. At the moment we can only send free text orders to {SupplierName}.

Transacting online has advantages for both Jupiter Buyer Ltd and {SupplierName}. Removing paper from our transaction processes will save both our organisations money and contribute to a greener environment. I'm sure you agree that manual paper processes can be time consuming, inefficient, and a drain on resources.

To find out more about the ProcServe Trading Network, please visit <http://www.procserve.com/solutions-and-services/supplier-enablement-services.html>

Note: You can change some of the text in the reminder email but the second half remains static as this contains the important registration details.

4. When satisfied with the email click 'Send' at the footer of the page.

The following text will also be added to the email before being sent:

You can register your company as a supplier to ProcServe's Trading Network free of charge; there are no joining, hosting, or transaction fees for suppliers on our Trading Network.

Joining ProcServe's Trading Network will give you an Enhanced account. With your Enhanced account you can provide content, manage your orders, and return invoices.

You can register by following this {URL} which will take you to our registration site where you can self-register, using the User Name and password below:
{User Name / Password will appear here}

To find out more about ProcServe's Trading Network please visit our website at <http://www.procserve.com/solutions-and-services/supplier-enablement-services.html> or contact us at info@procserve.com

Thank you,
The ProcServe Supplier Team

Once the email has been sent you will get a success message.

Supplier Registration

[Browse invited suppliers \(1\)](#) [Top targeted suppliers \(0\)](#) [Now enhanced suppliers \(1\)](#)

Success! Your email has been sent to the suppliers you selected.

To:	nasir.ahmed41@procserve.org
Subject: *	A reminder from SATURN LTD

We recently invited you join the ProcServe Trading Network. I notice that you haven't yet registered.

The ProcServe Trading Network is SATURN LTD's preferred method of sending orders to our suppliers and all our orders will be sent to you via the ProcServe Trading Network.

We would like you to join the ProcServe Trading Network so you can provide content for our buyers and return invoices. At the moment we can only send free text orders to {SupplierName}.

Transacting online has advantages for both SATURN LTD and {SupplierName}. Removing paper from our transaction processes will save both our organisations money and contribute to a greener environment. I'm sure you agree that manual paper processes can be time consuming, inefficient, and a drain on resources.

To find out more about the ProcServe Trading Network, please visit <http://www.procserve.com/solutions-and-services/supplier-enablement-services.html>

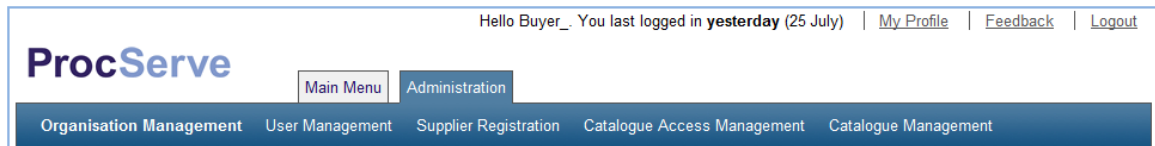
2.3.2.4 Targeting your Suppliers

Overview

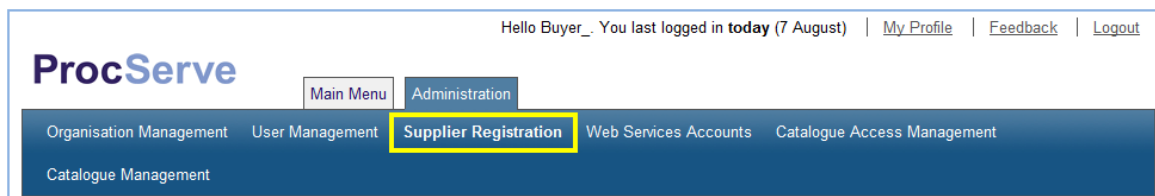
You can target certain suppliers you have invited to join the Procserve Trading Network. You can use this feature to make it easier to send reminder emails and track the status of priority suppliers.

Viewing your top targeted suppliers

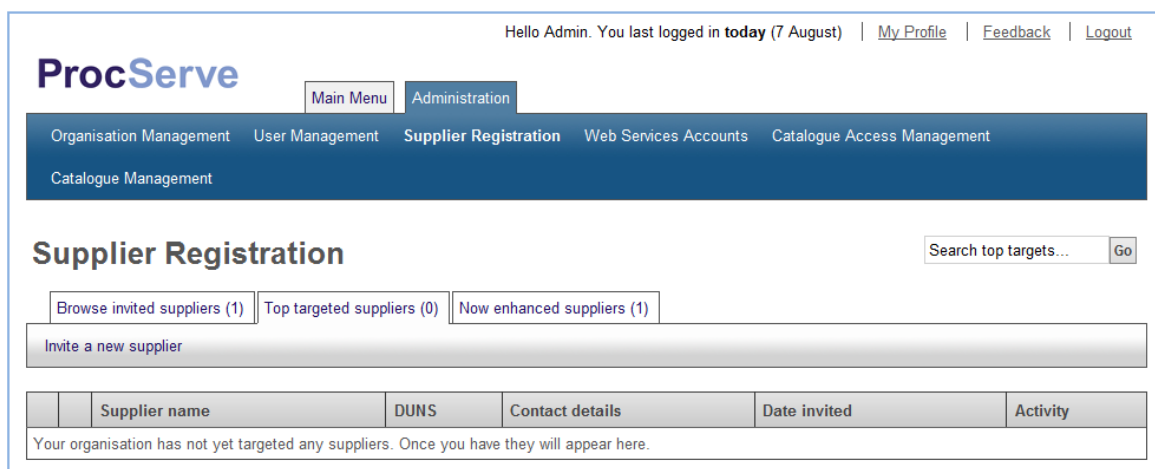
1. Click on the 'Administration' tab



2. Click 'Supplier Registration'



3. Click on 'Top targeted suppliers'



You can view all the suppliers in your top target list.

2.3.2.4.1 Adding a new supplier to your top targeted list

Overview

You can dynamically add and remove suppliers from your 'Top targeted suppliers' tab.

1. Search for the supplier in 'Browse invited suppliers'**2. Select the organisation you wish to add to the 'Top targeted suppliers' tab by clicking the flag.**

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ProcServe

[Main Menu](#) [Administration](#)

[Organisation Management](#) [User Management](#) [Supplier Registration](#) [Web Services Accounts](#) [Catalogue Access Management](#)

[Catalogue Management](#)

Supplier Registration

Search suppliers...

[Browse invited suppliers \(6\)](#) [Top targeted suppliers \(2\)](#) [Now enhanced suppliers \(6\)](#)

[Invite a new supplier](#)

	Supplier name	DUNS	Contact details	Date invited	Activity
	The Atlas	213453967	Atlas Man nasir.ahmed60@procserve.org <input type="button" value="Edit"/>	07 Aug 2012	0
	COMPAY LTD	458973823	A Company nasir.ahmed58@procserve.org <input type="button" value="Edit"/>	01 Aug 2012	0
	QUICK LTD	846911951	Nas Ahmed nasir.ahmed7@procserve.org <input type="button" value="Edit"/>	15 May 2012	0

Your 'Top targeted suppliers' tab will now be updated with the number of suppliers targeted.

Tip! You can remove suppliers from the top targeted list by clicking the flag.

2.3.3 Managing your Users

2.3.3.1 Introduction to User Management

Overview

You can add, edit and deactivate users within your organisation in 'User Management'.

2.3.3.2 Add a New User

To add a New User to your Organisation.

1. Log on to PCH as administrator.
2. At home page select Administration menu, then select 'User Management'.
3. Click on 'Add a new user'.

ProcServe

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Main Menu Administration

Organisation Management **User Management** Supplier Registration Catalogue Access Management Catalogue Management

User Management

Search users...

Browse Users (6)

Add a new user

Status	User's name	Email address	User Name	Date added	Date last updated
ENABLED	Super_Nas	nasir.ahmed18@procserve.org	super_nas@strn011	10 Feb 2012	07 Aug 2012
ENABLED	Buyer_Administrator	nasir.ahmed55@procserve.org	buyer_administrator@strn011	20 Jul 2012	07 Aug 2012
ENABLED	Basic_User	nasir.ahmed60@procserve.org	basic_user@strn011	26 Jul 2012	26 Jul 2012
ENABLED	Admin_Nas	nasir.ahmed16@procserve.org	admin_nas@strn011	10 Feb 2012	23 Jul 2012
ENABLED	Alex Kentish	alex.kentish11@procserve.org	alexkentish@strn011	27 Jun 2012	28 Jun 2012
ENABLED	Deborah Shadare	deborah.shadare12@procserve.org	deborahshadare@strn011	27 Jun 2012	28 Jun 2012

Showing 1 to 6 of 6 users

4. Complete the form, from dropdown menu select the appropriate role for the user and click on 'Add this user' button

User Management

Browse Users (6)

Add a new user

Step 1 - Add user information

Title *	Mr
First name *	
Last name *	User
User Name	This will be generated by the system
Email address *	
Confirm Email address *	
Organisation	SATURN LTD
Default address	The Red Building Hoe Street Walthamstow - E17 4SD
Telephone number	
Fax number	
Preferred language	English (UK)
Job title	
Document notifications	<input checked="" type="checkbox"/> Receive email notifications for new documents
Role *	<div> Buyer super user Buyer administrator Buyer super user Buyer contract manager Buyer authoriser Advanced buyer Basic buyer Buyer reporter </div>

Add this user

Upon completing the form and clicking on the 'Add this user' button, you will receive two emails, one containing username and second containing a temporary password.

Note: The temporary password is one time use only, you will be asked to change the temporary password as you login for the first time.

TIP: Copy and paste your username password from your emails instead of typing in manually.

Below are examples of one of two email the user receives.

Email with username

Hello Super

Welcome to the Zanzibar eMarketplace.

Your account has been set up and you can now access the marketplace at any time from your Internet browser. To access your account you will need both your User Name (included below) and your Password (which will be sent in a separate email for security reasons).

Your User Name is: super_demo@strn011

Once you have received your password you will be able to log in at:

https://buyers.procserveonline.com/otis/login.html?marketplaceId=2&locale=en_GB

It is recommended that instead of typing the User Name, try copying and pasting it into the login screen using the following steps:

1. Highlight the User Name making sure there are no spaces at the beginning or the end
2. Right click and select 'Copy'
3. In the User Name field of the login screen right click again and select 'Paste'

Email with password

Hello Super

Welcome to the Zanzibar eMarketplace.

Your account has been set up and you can now access the marketplace at any time from your Internet browser. To access your account you will need both your User Name (which will be sent in a separate email for security reasons) and your Password (included below).

Your temporary Password is: bBy7Bn)P

Using this and your User Name you can now log in to the eMarketplace at:

https://buyers.procserveonline.com/otis/login.html?marketplaceId=2&locale=en_GB

It is recommended that instead of typing the Password try copying and pasting it into the login screen using the following steps:

1. Highlight the Password making sure there are no spaces at the beginning or the end
2. Right click and select 'Copy'

5. Copy and paste the URL from the email into your browser.
6. At log in screen, copy and paste username and password and click on 'Login' button.
7. You will be asked to change your temporary password to something that you will be able to remember.
8. Also you need to provide a memorable word so if you locked your account you will be asked to provide the memorable word to unlock your account.

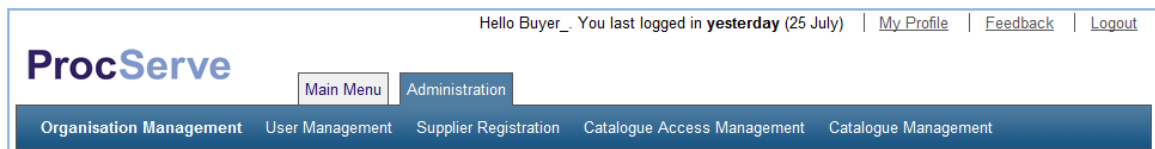
2.3.3.3 Editing an Existing User

Overview

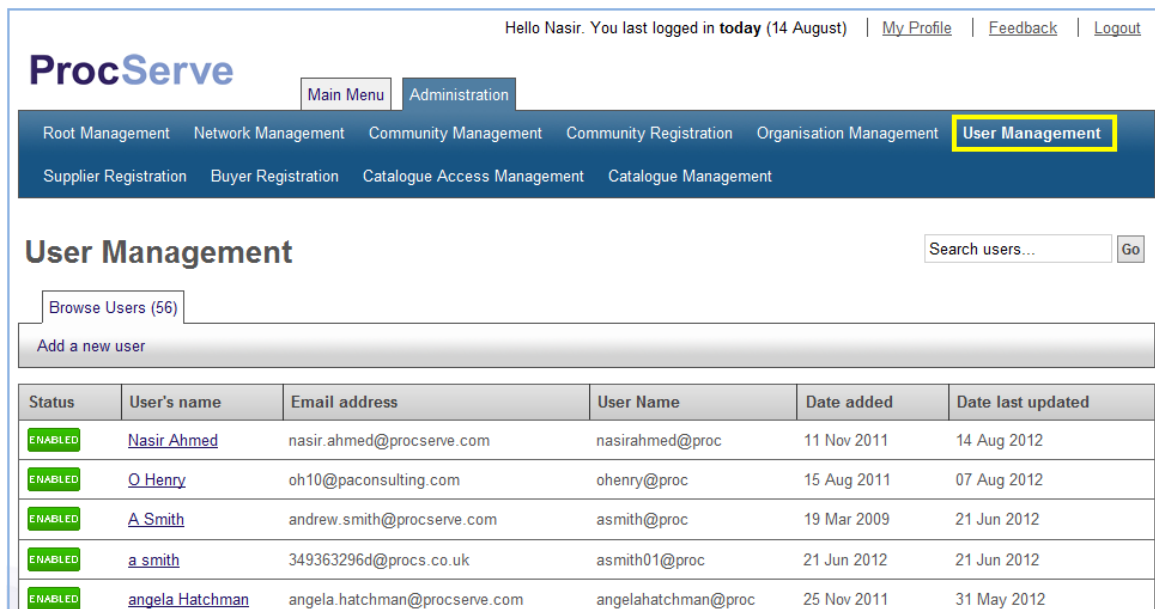
You can edit the basic details of a user in User Management.

To edit a user

1. Click on the 'Administration' tab



2. Click on 'User Management' and then the link of the user you wish to add to an organisation



3. Click on 'Edit general information'

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ProcServe

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[Catalogue Management](#)

User Management

[Browse Users \(7\)](#)

[General](#) [Roles](#) [Classification Views](#)

Mr Super Buyer

[Edit](#)

Status	Enabled
User Name	superbuyer@jptr004
Email address	nasir.ahmed13@procserve.org
Organisation	Jupiter Buyer Ltd
Default address	123 Buckingham Palace Road London SW1W 9SR United Kingdom
Telephone number	11112223333
Fax number	
Preferred language	English (UK)
Job title	Tester
Document notifications	Receive email notifications for new documents

4. When complete click 'Save' at the footer of the page

Note: You can also edit the roles the user has access to on the 'Roles' button.

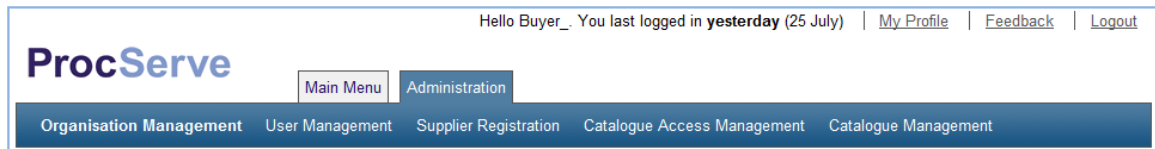
2.3.3.4 Editing the Roles a User has in an Organisation

Overview

At any time you can amend a users role they have within an organisation.

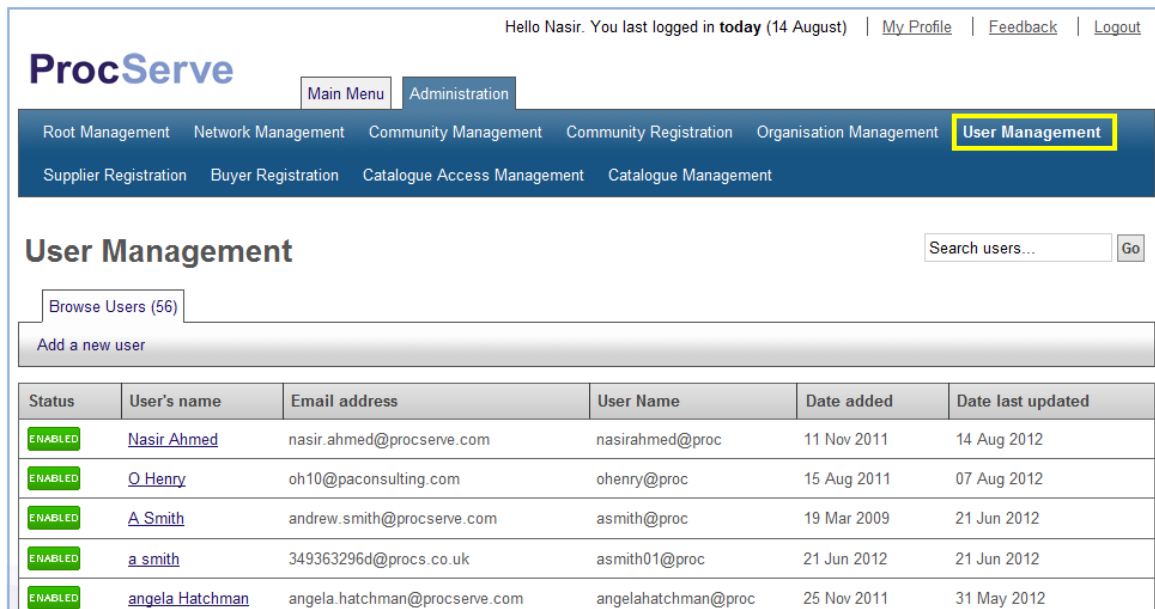
To edit the roles of a user

1. Click on the 'Administration' tab



2. Click on 'User Management'

3. Click on the user you wish to edit the roles for



4. Click on 'Roles' to edit their roles in the organisation

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ProcServe


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Catalogue Management

User Management

Browse Users (7)

General **Roles** Classification Views

Mr Super Buyer 

Status	Enabled
User Name	superbuyer@jptr004
Email address	nasir.ahmed13@procserve.org
Organisation	Jupiter Buyer Ltd

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User Management

Browse Users (7)

General Roles Classification Views

Mr Super Buyer

Role	Description	
Buyer administrator	Buyer Administrator users are have the ability to manage their organisations and users	Enable role
Buyer super user	Buyer Super Users are user that have the ability to see all the external documents in their own organisation (RFQ's, Quotes, Purchase Orders, Invoices, Credit Notes, etc)	Disable role
Buyer contract manager	A buyer contract manager has the ability to invite and manage suppliers	Enable role
Buyer authoriser	A buyer authoriser can approve or reject requisitions	Disable role
Advanced buyer	Advanced buyers have the ability to raise request for quotations.	Disable role
Basic buyer	Basic buyers have the ability to raise requisitions by catalogue shopping or free text order.	Disable role
Buyer reporter	Buyer reporter have the ability to use reporting features.	Disable role

5. Enable and disable roles as required by clicking the 'Enable role' or 'Disable role' button as necessary.

Note: There is no need to save any changes but the user will have to re-log in for the changes to take effect.

2.3.4 Administering Procserve Commerce Hub

2.3.4.1 Managing my Organisation

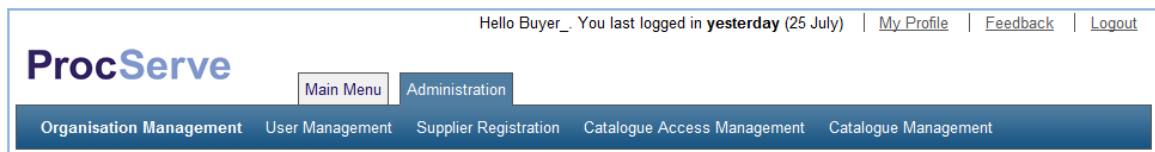
2.3.4.1.1 Editing the Organisation's General Details

Overview

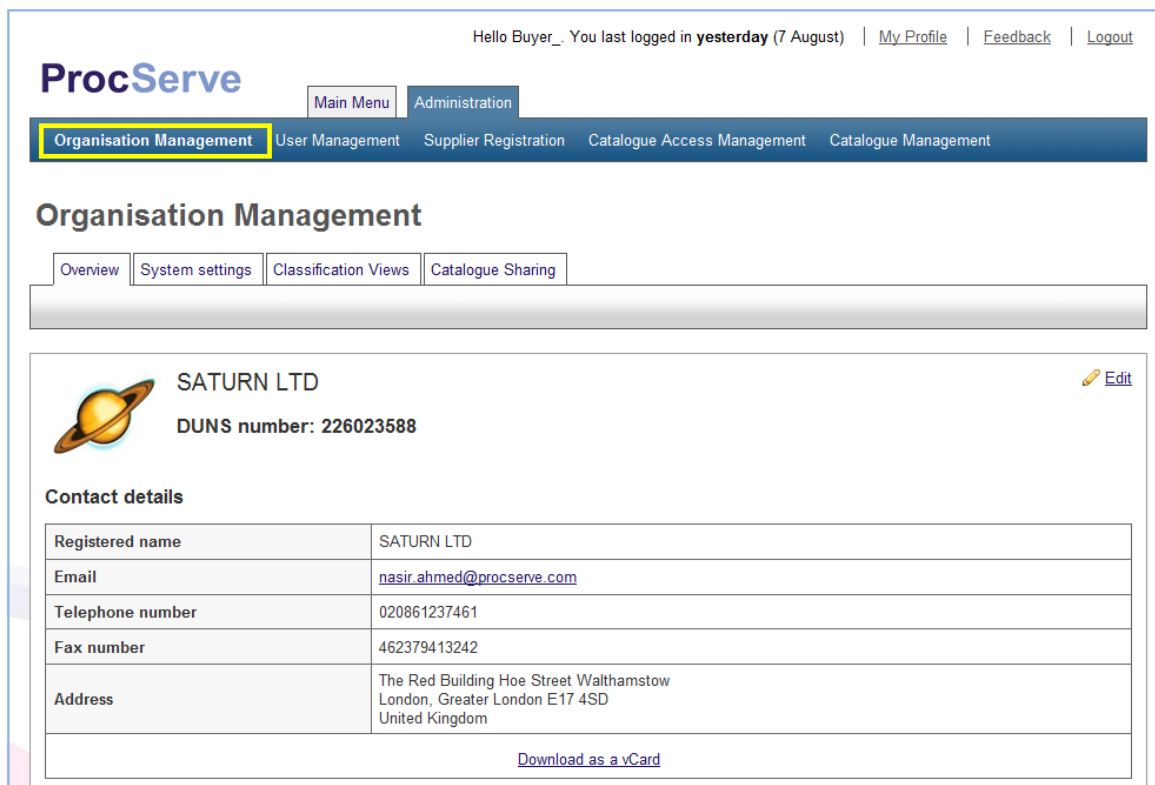
You can view and edit the the general address details of your organisation in 'Organisation Management'.

Editing your Organisation's overview

1. Click on the 'Administration' tab



2. Click on 'Organisation Management'




3. To edit the details click 'Edit'

4. Once complete click 'Save Changes'

Organisation Management

[Overview](#) [System settings](#) [Classification Views](#) [Catalogue Sharing](#)

Organisation name *	SATURN LTD
Logo	<div> Browse...</div> <p>Make sure that the image you use is 100 pixels wide by 80 pixels high - leave this blank to continue using the current image</p>
DUNS number	226023588 - Sorry you can't edit this

Contact details

Registered name *	SATURN LTD
Website	
Email	nasir.ahmed@procserve.com
Telephone number	020861237461
Fax number	462379413242
Address *	The Red Building Hoe Street Walthamstow
City / town *	London
County	Greater London
Country *	United Kingdom
Post Code *	E17 4SD

Financial information

Tax rate	GB VAT Standard 20.0%
Tax number	GB891208789

Other information

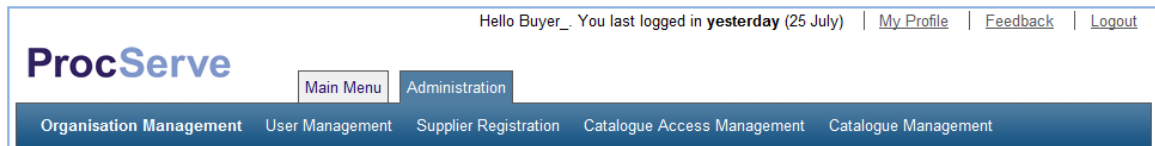
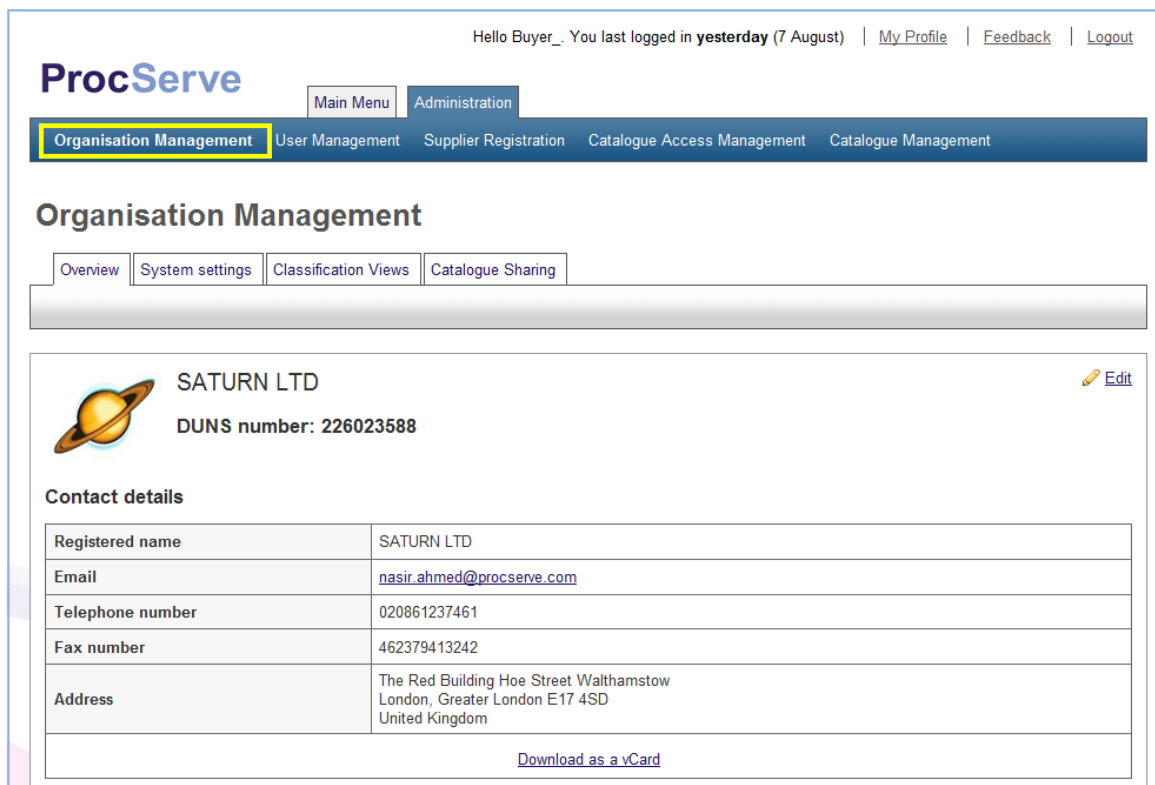
Purchase Order T&C	
--------------------	--

Save Changes

2.3.4.1.2 Editing the Organisation's System Details

Overview

You can edit your organisations system settings in 'Organisation Management' 'System Settings'

Editing your organisation's system settings**1. Click on the 'Administration' tab****2. Click on 'Organisation Management'****3. Click on 'System Settings'**

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ProcServe

Main Menu Administration

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Organisation Management

Overview System settings Classification Views Catalogue Sharing

SATURN LTD 

System set up

Short name	strn011
Default language	English (UK)
Skin	ProcServe - default
Approval	Orders need approval before being submitted to suppliers
Payment Options	Invoice, Credit / Debit Card, Lodged Card, ProcServe ePayment
Shared secret	kw4@BjbN
Use shared secret?	No

4. To edit the system settings click 'Edit'

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ProcServe

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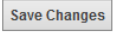

Organisation Management

Overview System settings Classification Views Catalogue Sharing

SATURN LTD

System set up

Short name	strn011 - Sorry you can't edit this
Default language *	English (UK) 
Skin	ProcServe - default - Sorry you can't edit this
Approval	<input checked="" type="checkbox"/> Orders need approval before being submitted to suppliers
Payment Options	<input checked="" type="checkbox"/> Invoice <input checked="" type="checkbox"/> Credit / Debit Card <input checked="" type="checkbox"/> Lodged Card <input checked="" type="checkbox"/> ProcServe ePayment
Shared secret	kw4@BjbN
Use shared secret?	<input type="checkbox"/>

5. Once complete, click 'Save Changes'

